

County Recorder User Guide

Cost Accounting System (CAS)

Guide does not include initial set-up guidelines. This guide is a step-by-step processing guide for everyday processing.

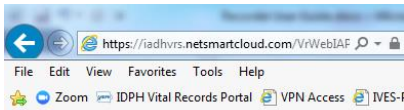
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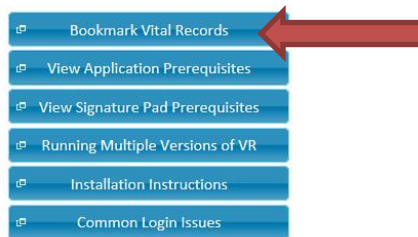
Logging In

Open up Internet Explorer, depending how the application was installed, the shortcut to the URL may be bookmarked or set as a favorite.

<https://iadhvrs.netsmartcloud.com/VRWebIAPROD>



Iowa Vital Events System



Log into the IVES System

Note: Passwords must be at least 8 characters, and contain an uppercase and lower case letter, a number and a special character.

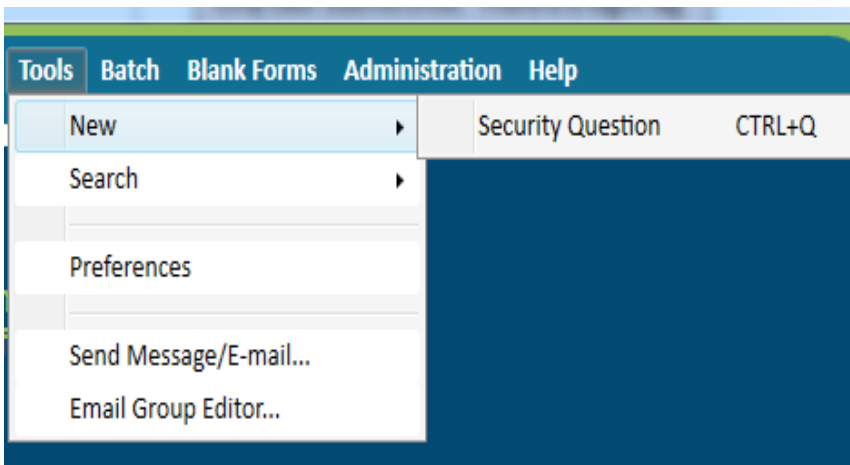
(Note: **Very important you use this link to bookmark.** Below the login box, you can bookmark the application for future use. This will bookmark the above page.)

Answer your security question.

This question will be asked every time you login to the system. There are no requirements for lower, upper case, or special characters or numbers. However, the question answer is case sensitive.

Only click Submit once. There is a slight lag time so please be patient.

Creating Security Questions



To create new Security Questions

Select Tools > New > Security Questions

Enter your security question

Enter your answer to the security question.



Click **SAVE**


A screenshot of the 'Security Question' form. The form has a title bar 'Security Question (Event Year = 2014)' and a menu bar 'File Search Fee/CAS Requests Actions Linking Tools Help'. The main content area has a tab 'Security Question' and a subtitle 'Enter a security Question for yourself.'. There are two input fields: 'Question' and 'Answer to the Question', both highlighted with red boxes. Below these are fields for 'User Login or ALL' (with value 'latest1') and 'System Paragraph' (with sub-fields for 'Date question created.', 'Question Modified date', and 'State File Number'). The bottom status bar shows 'Adding a new event.' and '0 Alerts:'.

Home Screen

Netsmart VRS - Home

File Search Fee/CAS Work Queue Tools Batch Blank Forms System Cache Administration Help

close


 **Iowa PRODUCTION**
Department of Health
Office of Vital Records
Iowa

MESSAGE OF THE DAY

BA 2.0.1 - Release 2.0.75
July 1, 2015

This is the main IVRS Home Page.

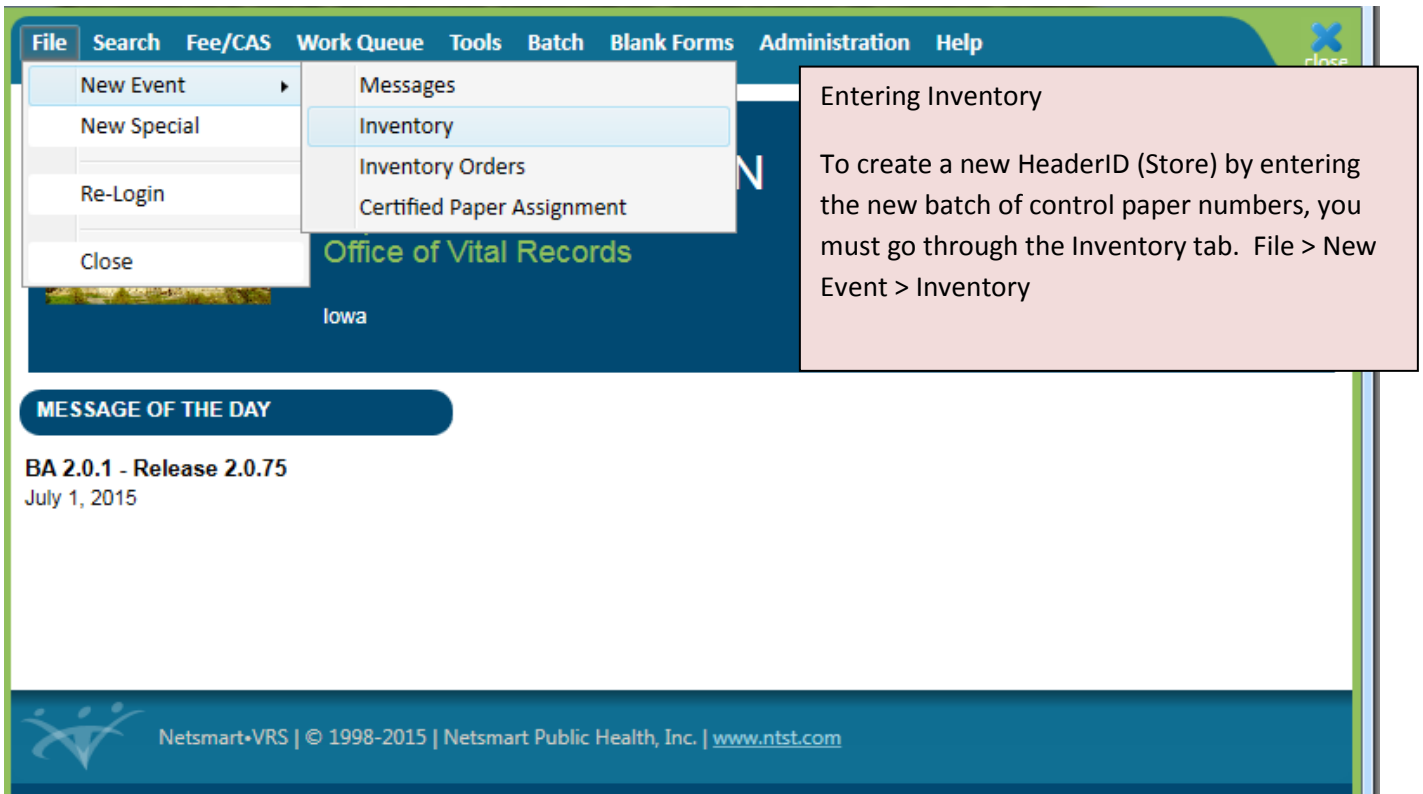
Note: The Internet window that you logged in from must remain open for the Netsmart VRS application to work.

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Unread Messages: 5

Entering Inventory

Note: This process can be used everytime a new HeaderID (Store) is created. Recommend each HeaderID (Store) has 1000 pages of control paper.



File Search Fee/CAS Work Queue Tools Batch Blank Forms Administration Help

- New Event
- New Special
- Re-Login
- Close

- Messages
- Inventory
- Inventory Orders
- Certified Paper Assignment

Office of Vital Records
Iowa

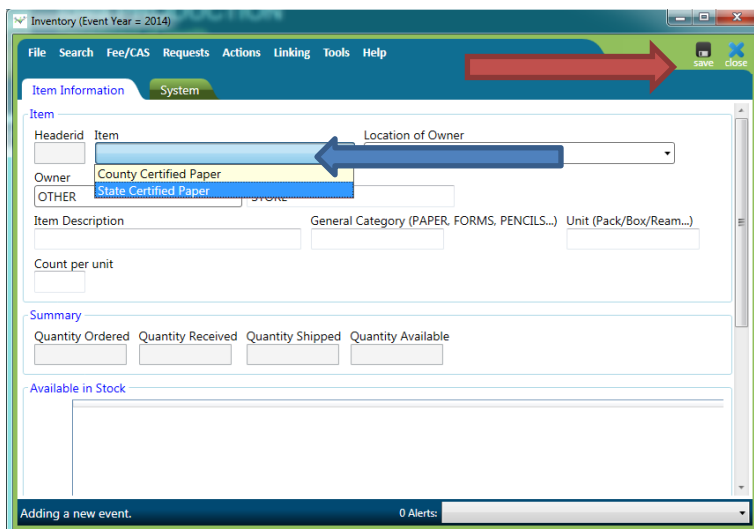
Entering Inventory

To create a new HeaderID (Store) by entering the new batch of control paper numbers, you must go through the Inventory tab. File > New Event > Inventory

MESSAGE OF THE DAY

BA 2.0.1 - Release 2.0.75
July 1, 2015

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Inventory (Event Year = 2014)

File Search Fee/CAS Requests Actions Linking Tools Help

Item Information System

Item

Headerid Item Location of Owner

Owner County Certified Paper

OTHER State Certified Paper

Item Description General Category (PAPER, FORMS, PENCILS...) Unit (Pack/Box/Ream...)

Count per unit

Summary

Quantity Ordered	Quantity Received	Quantity Shipped	Quantity Available

Available in Stock

Adding a new event. 0 Alerts

To enter NEW **State** Paper inventory

Click on the drop down arrow under **ITEM**, and click **State Certified Paper**.

Click **SAVE**

Inventory (Event Year = 2015)

File Search Fee/CAS Requests/Documents Actions Linking Tools Help

Item Information

Item: 408 State Certified Paper Location of Owner: STORE Owner: OTHER

Item Description: State Certified Paper General Category (PAPER, FORMS, PENCILS...) Unit (Pack/Box/Ream...) Count per unit EACH

Summary


Quantity Ordered Quantity Received Quantity Shipped Quantity Available

Available in Stock

Refresh Stock View Paper Sheet Find The Stock Number

Transaction Details

Event data was saved. 0 Alerts

Next you will add the quantities that were shipped by clicking the  under Transaction Details at the bottom of the page.

Inventory Transactions (Event Year = 2013)

File Search Fee/CAS Requests Actions Linking Tools Help

Transactions System

Item Information

Item: State Certified Paper User Location: Keokuk Person Assigned: STORE

Transaction

Transaction Date: 03/26/2014 Transaction: RECEIVE Pull info from Selected Stock Part or Desc:

Quantity: ORDER RECEIVE RESTOCK SHIP SPLIT-ALL-TO-STOCK SPLIT-IN SPLIT-OUT USE VOID

Split stock into small

Count Start Count Start Count Start

Split Consistency CHECK Split OK? X

Enter in the Transaction Date, the Transaction Type, Quantity and the Begin and End number.

When you receive a shipment of paper (*or when setting up for the first time*), select the Transaction type “Receive”, enter the quantity and the Begin and End number.

Click SAVE and Close

Inventory Transactions (Event Year = 2013)

File Search Fee/CAS Requests Actions Linking Tools Help

Transactions System

Item Information

Item: State Certified Paper User Location: Keokuk

Transaction

Transaction Date: 03/26/2014 Transaction: RECEIVE Pull info from Selected Stock Part or Desc:

Quantity: 500 Begin number: 356190001 End: 356190500 Notes:

File Search Fee/CAS Requests/Documents Actions Linking Tools Help

Item Information Skipped Stock System

Item
Headerid Item Location of Owner Owner
407 State Certified Paper Story OTHER STORE

Item Description General Category (PAPER, FORMS, PENCILS...) Unit (Pack/Box/Ream...) Count per unit
State Certified Paper EACH

Summary
Quantity Ordered Quantity Received Quantity Shipped Quantity Available
0 500 0 500

Available in Stock

Item	PartDesc	Quantity	Start	End	StockID
State Certified Paper		500	100000001	100000500	365164

Refresh Stock View Stock Number

Transaction Details

Item	Part Desc	Date	Transaction	Quantity	Start	End	Ship To	Notes	DetailID
State Certified Paper		7/27/2015	RECEIVE	500	100000001	100000500			10716

Event data was saved. 0 Alerts

After you close, click the Refresh Stock View button. You will see under Available in Stock, the paper that you received into the system.

File Search Fee/CAS Requests/Documents Actions Linking Tools Help

Item Information Skipped Stock System

Item
Headerid Item Location of Owner Owner
407 State Certified Paper Story OTHER STORE

Item Description General Category (PAPER, FORMS, PENCILS...) Unit (Pack/Box/Ream...) Count per unit
State Certified Paper EACH

Summary
Quantity Ordered Quantity Received Quantity Shipped Quantity Available
0 500 0 500

Available in Stock

Item	PartDesc	Quantity	Start	End	StockID
State Certified Paper		500	100000001	100000500	365164


Refresh Stock View Paper Sheet Find The Stock Number

Transaction Details

Item	Part Desc	Date	Transaction	Quantity	Start	End	Ship To	Notes	DetailID
State Certified Paper		7/27/2015	RECEIVE	500	100000001	100000500			10716

Event data was saved. 0 Alerts

Next, you need to split the received paper to have it available in stock to print.

Under Transaction Details, click the 

Inventory Transactions (Event Year = 2015)

File Search Fee/CAS Requests/Documents Actions Linking Tools Help

Transactions System

Item Information

Item: State Certified Paper User Location: Story Person Assigned: STORE

Transaction

Transaction Date: 07/27/2015 Transaction: **SPLIT-ALL-TO-STOCK** Pull info from Selected Stock

Quantity: 500

Send to User Location: SHIP

Split stock into small:

Count: Start: End: Split OK? X

Split Consistency CHECK

Enter the Transaction Date, and use the Transaction type "Split-All-To-Stock"

Click "Pull info from Selected Stock". This will populate the paper quantity, begin number and end number below.

File Search Fee/CAS Requests/Documents Actions Linking Tools Help

Transactions System

Item Information

Item: State Certified Paper User Location: Story

Transaction

Transaction Date: 07/27/2015 Transaction: **SPLIT-ALL-TO-STOCK** Pull info from Selected Stock

Quantity: 500 Begin number: 200000001 End: 200000500

Click Save

Inventory (Event Year = 2015)

File Search Fee/CAS Requests/Documents Actions Linking Tools Help

Item Information

Item: State Certified Paper Location of Owner: STORE

Summary

Quantity Ordered	Quantity Received	Quantity Shipped	Quantity Available
0	500	0	500

Available in Stock

Item	Part Desc	Quantity	Start	End	StockID
State Certified Paper		1	1000000001	1000000001	365165
State Certified Paper		1	1000000002	1000000002	365166
State Certified Paper		1	1000000003	1000000003	365167
State Certified Paper		1	1000000004	1000000004	365168
State Certified Paper		1	1000000005	1000000005	365169
State Certified Paper		1	1000000006	1000000006	365170
State Certified Paper		1	1000000007	1000000007	365171
State Certified Paper		1	1000000008	1000000008	365172
State Certified Paper		1	1000000009	1000000009	365173
State Certified Paper		1	1000000010	1000000010	365174
State Certified Paper		1	1000000011	1000000011	365175

Refresh Stock View

Transaction Details

Item	Part Desc	Date	Transaction	Quantity	Start	End	Ship To	Notes
State Certified Paper		7/27/2015	RECEIVE	500	1000000001	1000000500		1
State Certified Paper		7/27/2015	SPLIT-ALL-TO-STOCK	500	1000000001	1000000500		1

Click "Refresh Stock View"

You will see that all the paper has been split.

Click Save and close.

Inventory (Event Year = 2014)

File Search Fee/CAS Requests Actions Linking Tools Help

Item Information

Item: County Certified Paper Location of Owner: Polk

Owner: State Certified Paper

Item Description: General Category (PAPER, FORMS, PENCILS...) Unit (Pack/Box/Ream...)

Count per unit

Summary

Quantity Ordered	Quantity Received	Quantity Shipped	Quantity Available

Available in Stock

Adding a new event.

To enter NEW County Paper inventory

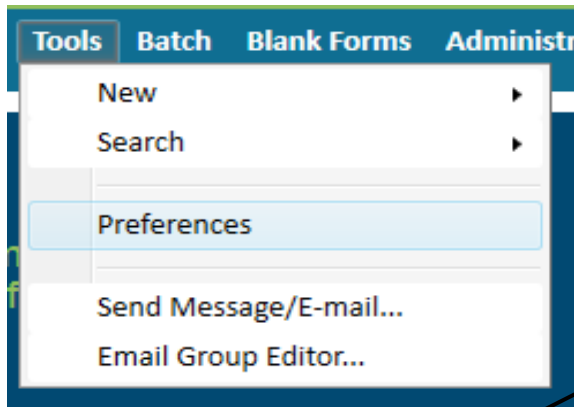
Click on the drop down arrow under ITEM, and click **County Certified Paper**.

Click **SAVE** and repeat the same steps as described above.

Printer Preferences

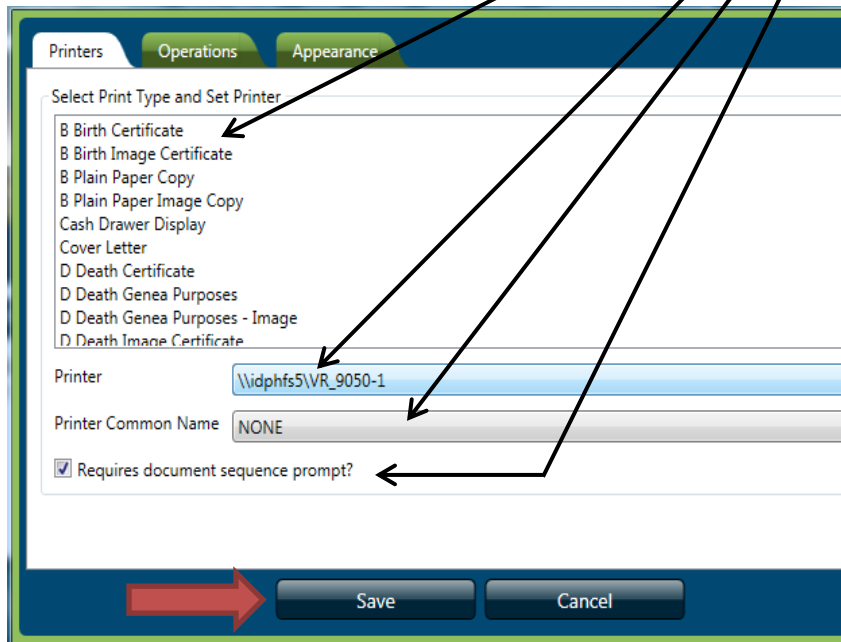
Note: each user must set up

This step will determine which printer the certificate prints from. This will also set up which paper (State or County) should print for the birth, death and non-IVES. *Note: this should only need to be set once, unless user changes printers.*



To set the Printer Preferences

Select Tools > Preferences from the Menu



From the Printer tab

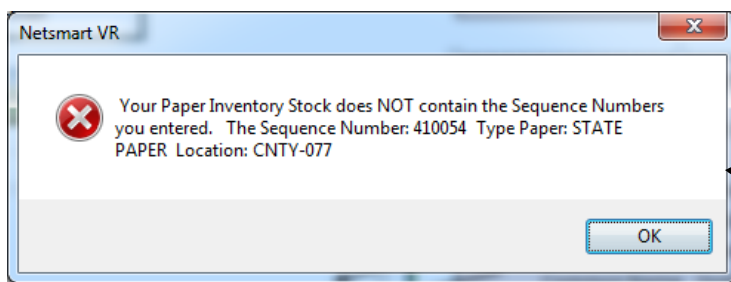
1. Select the Document (Certificate) you wish to set.
2. Select the appropriate Printer you want this certificate to print from.
3. Select None, from the Printer Common Name.
4. The "Requires document sequence prompt" **must** be selected. This is important because it connects the inventory paper to the application.



Click **SAVE**

This process must be completed for **all** the certificates listed.

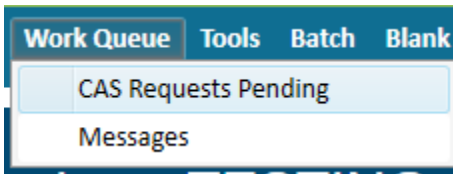
- Birth Certificate – **State Paper**
- Birth Image Certificate – **State Paper**
- Death Certificate – **State Paper**
- Death Genea Purposes – **State Paper**
- Death Genea Purposes Image – **State Paper**
- Death Image Certificate – **State Paper**
- Fact of Death – **State Paper**
- Death VA Copy – **State Paper**
- Death VA Copy Image – **State Paper**
- M CERT COPY MARRIAGE – **State Paper**
- M CERT IMAGE MARRIAGE – **State Paper**
- Notice of Record Search – **State Paper**
- Non-IVES Certificate(11/21/2016s) - **County Paper**



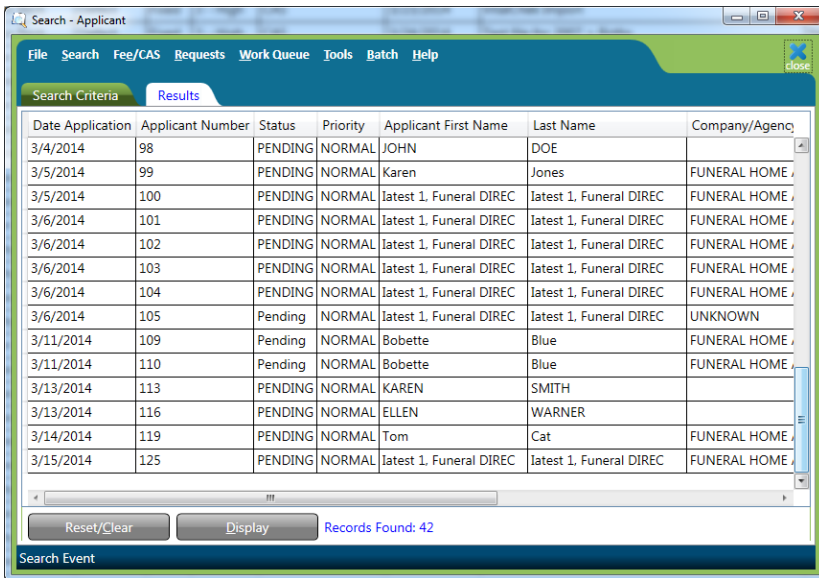
This message will appear if you manually enter the wrong safety paper from your inventory. You need to be sure to enter the correct set of numbers for State and County stocks. (this example shows the message if user enters a County safety paper # for a Death Certificate, must use State paper).

Work Queues

Work Queues will populate with requests for death certificate that were submitted by Funeral Homes along with any pending requests not yet processed. It is important that users check these work queues through out the day.

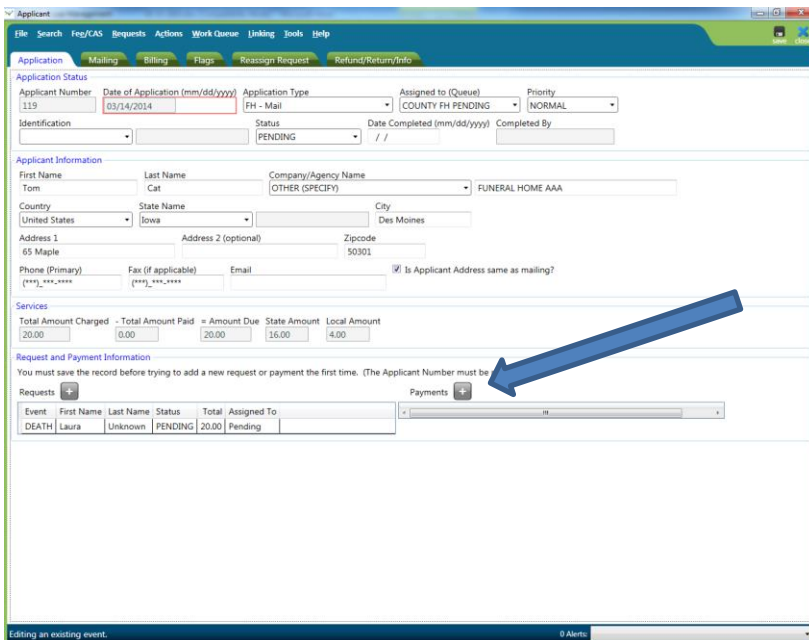



Select Work Queue > CAS Requests Pending from the Menu



All requests submitted by Funeral Directors along with other pending requests will be listed in the "Results" tab.

Select the request you wish to process by double clicking the row, or select the row and click on "Display".



The Applicant will appear. Select the  to enter payment.

Payment for Services Flags

Payment

Payment Date: 03/29/2014 Payment Type: CASH Check/MO Number: Payment Amount: 20.00

Drawer Name: Change the Drawer for this payment.

Create Date/Time: 03/29/2014 09:47:48 User Create Name: IATEST 1, RECORDER POLK Internal payment notes:



Enter the payment type. Be sure to enter check number if applicable, and enter amount paid.

If you are splitting the amount between 2 different money types, each money type must be entered separately.

Example: Someone pays \$20 in cash and writes you a check for \$20. You will click the Plus button to access the Payment screen, choose cash and \$20 for the payment amount. Click SAVE and Close. For the second amount, click the Plus button to access the payment screen, choose check, enter the check number and enter \$20 for the payment amount. Click SAVE and Close. The Payment grid will reflect both payments.

me. (The Applicant Number must be present)

Payments +

Payment Date	Payment Type	Check Num	Amount	Receipt No	Returned	Pay
3/26/2014	CASH		20.00	192		122
3/26/2014	CHECK	1294	20.00	192		122

Click **SAVE and Close**

Request and Payment Information

You must save the record before trying to add a new request or payment the first time. (The Applicant Number must be present)

Requests +

Event	First Name	Last Name	Status	Total	Assigned To
DEATH	Laura	Unknown	PENDING	20.00	Pending

Payments +

Payment Date	Payment Type	Check Num	Amount	Receipt No	Returned	Pay
3/29/2014	CASH		20.00	119		70

Select the "Requests" by double clicking on the row.

Service Information

To add a service, click the Add New Service button or click the + (Plus) button.

To change service information, select a row and then change the information in the fields at the top of the paragraph.

To view the details of a service, double click an entry or select an entry and press ENTER key.

Add New Service

Service Type: Certified Copy Fee Type: Standard Copies: 1 Status: PENDING Save Service

Event Type	Service Type	Fee Type	Copies	Service Total	Status	Search?	ServiceID
DEATH	Certified Copy	Standard	1	20.00	PENDING	Y	350

Services +

Select the appropriate **Service Type, Fee Type, the number of copies** requested and select

Click **Save Service**

Service Information

To add a service, click the Add New Service button or click the + (Plus) button.

To change service information, select a row and then change the information in the fields at the top of the paragraph.

To view the details of a service, double click an entry or select an entry and press ENTER key.

Service Type:
 Fee Type:
 Copies:
 Status:

Event Type	Service Type	Fee Type	Copies	Service Total	Status	Search?	ServiceID
DEATH	Certified Copy	Standard	1	20.00	PENDING	Y	350

Services

If the service is for a death or certain birth event, select the service (*should be highlighted*) and select the **Search for Event Record** button.

Search

Search - Death

File Search Fee/CAS Requests Tools Batch Help

Search Criteria Results

State File Number	Last Name	Last Name Soundex	First	Middle Name	Sex	Date of Death	Facility Name
2014000007	Adams	A352	Joseph	Merle	M	2/15/2014	Cass County Memorial Hospital-At

Reset/Clear Display Records Found: 1

Search Event **ALERT PRESENT**

The index for the requested record should appear.

Select Requests > Documents > *Certificate requests should appear.*

Requests Tools Batch Help

Documents D Death Certificate

Note: If the record was not found, the user can select 'Reset/Clear' button and change the search criteria.

Once the record is found, be sure not to exit until the document has printed to ensure safety paper was not damaged.

Input Text

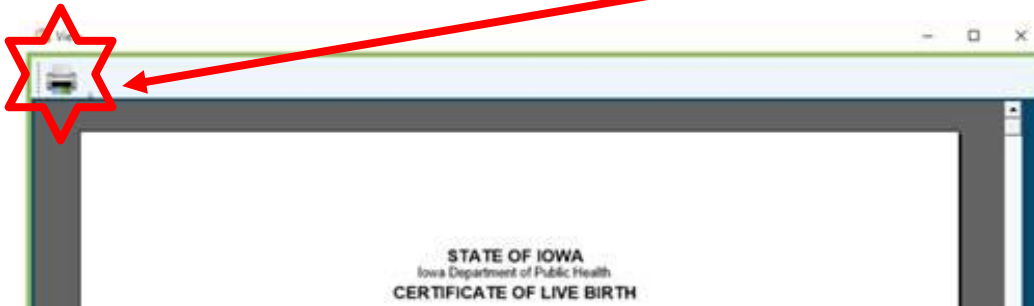
Please enter the beginning document sequence or a range of document sequences separated by a comma.

☐ Is high to low?

If the printer preferences was set to "Requires document sequence prompt", the dialog box will display asking for the safety paper number to be used. Enter the safety paper number(s) and select "OK"

*Note: If more than one document was requested, the user may enter the first safety paper number and the last safety paper number, separated by a comma **OR** just enter the beginning safety paper number (the system will print out the total number of safety paper based on the number of copies you entered in the service.)*

The next screen to appear is the Print Preview screen, once the record is reviewed you can print it from this screen. **(Do Not Select Close)**. When you are ready to print - Click the print icon in the upper left hand corner. Close preview screen.



At-a-glance printing steps:

- + Search for Event Record
- + Click on Request/Documents
- + Enter the safety paper number
- + Preview image of certificate
- + Click on the print icon near the upper left hand corner
- + Close preview screen

New applications for fee purposes

Netsmart VRS - Home

File Search Fee/CAS Work Queue Tools Batch Blank Forms Administration Help

New Applicant
Search Deposit
Cash Drawer

Iowa Department of Health Office of Vital Records

MESSAGE OF THE DAY

BA 2.0.1 - Release 2.0.75
July 1, 2015

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These will be vital records that you print on county certified paper.

On the IVES Home Page,
click Fee/CAS > New > Applicant

Applicant

File Search Fee/CAS Requests Actions Work Queue Linking Tools Help

Application Mailing Billing Flags Reassign Request Refund/Return/Info

Application Status

Applicant Number Date of Application (mm/dd/yyyy) Application Type Assigned to (Queue) Priority

Identification Completed (mm/dd/yyyy) Completed By

First Name Last Name Company/Agency Name

United States Iowa City

Address 1 Address 2 (optional) Zipcode

Phone (Primary) Fax (if applicable) Email Is Applicant Address same as mailing?

Services

Total Amount Charged - Total Amount Paid = Amount Due State Amount Local Amount

Request and Payment Information

You must save the record before trying to add a new request or payment the first time. (The Applicant Number must be present)

Requests Payments

Adding a new event. 0 Alerts:

Required fields on this page are: Application Status, Date of Application, Application Type, First Name and Last Name. You can fill in additional information you wish.

You must click **SAVE** before proceeding to processing a payment.

Applicant

File Search Fee/CAS Requests Actions Work Queue Linking Tools Help

Application Mailing Billing Flags Reassign Request Refund/Return/Info

Application Status

Applicant Number: 192 Date of Application (mm/dd/yyyy): 03/26/2014 Application Type: Counter Assigned to (Queue): PENDING Priority: NORMAL

Identification: Status: PENDING Date Completed (mm/dd/yyyy): / / Completed By:

Applicant Information

First Name: JOE Last Name: SMITH Company/Agency Name:

Country: United States State Name: Iowa City:

Address 1: Address 2 (optional): Zipcode:

Phone (Primary): Fax (if applicable): Email: ☒ Is Applicant Address same as mailing?

Services

Total Amount Charged: 0.00 Total Amount Paid: 0 Amount Due: 0 State Amount: Local Amount:


Request and Payment Information

You must save the record before trying to add a new request or payment the first time. (The Applicant Number must be present)

Requests: Add a new REQUEST

Payments: Add a new PAYMENT

Event data was saved. 0 Alerts

Next, you will add a payment. Click the  button to access the Payment for Services screen.

If you are processing a FREE VA, a FREE marriage certified copy, or a NO Fee certificate there is no payment to enter. You skip this step.

Payment

File Search Fee/CAS Requests Actions Linking Tools Help

Payment for Services Flags

Payment

Payment Date: 03/26/2014 Payment Type: CASH Check/MO Number: Payment Amount:

Drawer Name: CHECK Enter for this payment.

Create Date/Time: 03/26/2014 14:19:36 Bird, Melissa R. Internal payment notes:


Adding a new event. 0 Alerts

Choose your payment type, enter check number if applicable, and enter amount paid.

If you are splitting the amount between 2 different money types, each money type must be entered separately.

Example: Someone pays \$20 in cash and writes you a check for \$20. You will click the Plus button to access the Payment screen, choose cash and \$20 for the payment amount. Click SAVE and Close. For the second payment type, click the Plus button to access the payment screen, choose check, enter the check number and enter \$20 for the payment amount. Click SAVE and Close. The Payment grid will reflect both payments.

ime. (The Applicant Number must be present)

Payments: 

Payment Date	Payment Type	Check Num	Amount	Receipt No	Returned	Pay
3/26/2014	CASH		20.00	192		122
3/26/2014	CHECK	1234	20.00	192		122

Applicant

File Search Fee/CAS Requests Actions Work Queue Linking Tools Help

Application Mailing Billing Flags Reassign Request Refund/Return/Info

Application Status

Applicant Number: 192 Date of Application (mm/dd/yyyy): 03/26/2014 Application Type: Counter Assigned to (Queue): PENDING Priority: NORMAL

Identification: Status: PENDING Date Completed (mm/dd/yyyy): / / Completed By:

Applicant Information

First Name: JOE Last Name: SMITH Company/Agency Name:

Country: United States State Name: Iowa City:

Address 1: Address 2 (optional): Zipcode:

Phone (Primary): Fax (if applicable): Email: ☒ Is Applicant Address same as mailing?

Services

Total Amount Charged: 0.00 Total Amount Paid: 40.00 Amount Due: (40.00) State Amount: Local Amount:

Request and Payment Information

You must save the record before adding a new request or payment the first time. (The Applicant Number must be present)

Requests: Add a new REQUEST.

Payments:

Payment Date	Payment Type	Check Num	Amount	Receipt No	Returned	Pay
3/26/2014	CASH		20.00	192		122
3/26/2014	CHECK	1234	20.00	192		122

Event data was saved. 0 Alerts:

Next, you will choose a Request type.

FYI -Applicants can request several records at one time using this system.

Request

File Search Fee/CAS Requests Actions Linking Tools Help

Service Marital Information Flags

Requested Record Information

Type of Event: Date of Event or Beginning Date (mm/dd/yyyy): End Date - if exact date is known enter here also (mm/dd/yyyy):

First Name: Middle Name: Last Name: Generational Identifier:

Purpose of Request: Relationship:

Service Totals for this request

Total of Services for this Request: State Amount: Local Amount:

Service Information

To add a service, click the Add New Service button or click the + (Plus) button.
To change service information, select a row and then change the information in the fields at the top of the paragraph.
To view the details of a service, double click an entry or select an entry and press ENTER key.

Add New Service Service Type: Fee Type: Copies: Status: PENDING Save Service

Services:

Search

Search for Event Record

System

Request Status: PENDING Date Status Changed: Changed By: Applicant ID: 192 Request Queue Assignment: Tracking Number (Ups/VC/FedEx):

Location Code: CNTY-054 User Location Description: Keokuk

Adding a new event. 0 Alerts:

Required fields are framed in Red: Type of Event, First Name of person on record, Last Name, Purpose of Request and Relationship to person of request.

Request

File Search Fee/CAS Requests Actions Linking Tools Help

Service Marital Information Flags

Requested Record Information

Type of Event: BIRTH Date of Event or Beginning Date (mm/dd/yyyy): / / End Date - if exact date is known enter here also (mm/dd/yyyy): / /

First Name: Jane Middle Name: Last Name: Williams Generational Identifier:

Purpose of Request: Legal Relationship: Spouse

Service Totals for this request

Service Information

To add a service, click the Add New Service button or click the + (Plus) button.
To change service information, select a row and then change the information in the fields at the top of the paragraph.
To view the details of a service, double click an entry or select an entry and press ENTER key.

Add New Service Service Type: Fee Type: Copies: Status: PENDING Save Service

Services +

Search

Search for Event Record

System

Request Status: PENDING Date Status Changed: / / Changed By: Applicant ID: 192 Request Queue Assignment: Tracking Number (Ups/Vc/FedEx):

Location Code: CNTY-054 User Location Description: Keokuk

Adding a new event. 0 Alerts:

After completing the Requested Record Information, you must SAVE.

Request

File Search Fee/CAS Requests Actions Linking Tools Help

Service Marital Information Flags

Requested Record Information

Type of Event: BIRTH Date of Event or Beginning Date (mm/dd/yyyy): / / End Date - if exact date is known enter here also (mm/dd/yyyy): / /

First Name: Jane Middle Name: Last Name: Williams Generational Identifier:

Purpose of Request: Legal Relationship: Spouse

Service Totals for this request

Service Information

To add a service, click the Add New Service button or click the + (Plus) button.
To change service information, select a row and then change the information in the fields at the top of the paragraph.
To view the details of a service, double click an entry or select an entry and press ENTER key.

Add New Service Service Type: Fee Type: Copies: Status: PENDING Save Service

Services +

Search

Search for Event Record

System

Request Status: PENDING Date Status Changed: 03/26/2014 Changed By: Bird, Melissa R. Applicant ID: 192 Request Queue Assignment: Tracking Number (Ups/Vc/FedEx):

Location Code: CNTY-054 User Location Description: Keokuk

Event data was saved. 0 Alerts:

Next you will add the service type.

Under Service Information, click the Add New Service button. Choose the Service Type, choose the Fee Type, enter the number of Copies you need, and click the Save Service button.

The service you added will populate in the grid. If you have collected money for more than one service, repeat the process as needed, and click **Save Service** each time. The grid will populate accordingly.

Add New Service Service Type: Certified Copy Fee Type: Standard Copies: 1 Status: PENDING Save Service

Event Type	Service Type	Fee Type	Copies	Service Total	Status	Search?	ServiceID
DEATH	Certified Copy	Standard	1	20.00	PENDING	Y	303

services +

Add New Service Service Type: Certified Copy Fee Type: Standard Copies: 1 Status: PENDING Save Service

Event Type	Service Type	Fee Type	Copies	Service Total	Status	Search?	ServiceID
DEATH	Certified Copy	Standard	1	20.00	PENDING	Y	303

Services +

Search for Event Record

BIRTH and DEATH IN IVES

If the service is an IVES **death or certain birth event**, click to highlight the service and select the **Search for Event Record** button.

Search - Death

File Search Fee/CAS Requests/Documents Tools Batch Help

Search Criteria Results

State File Number	Last Name	Last Name Soundex	First	Middle Name	Sex	Date of Death	Date Filed	Place of Death	County
2014900052	ANDERSON	A536	MARK	ALLEN	M	3/14/2014	3/15/2014	Olmsted	

Reset/Clear Display Records Found: 1

Search Event

The requested record should appear.

Select Requests/Documents > Documents > *Certificate requests should appear.*

Requests/Documents Tools Batch Help

Documents D Death Certificate

Results

Note: If the record was not found, the user can select 'Reset/Clear' button and change the search criteria.

Once the record is found and printed, be sure not to exit until the document has been reviewed to ensure safety paper was not damaged.

Input Text


Please enter the beginning document sequence or a range of document sequences separated by a comma.

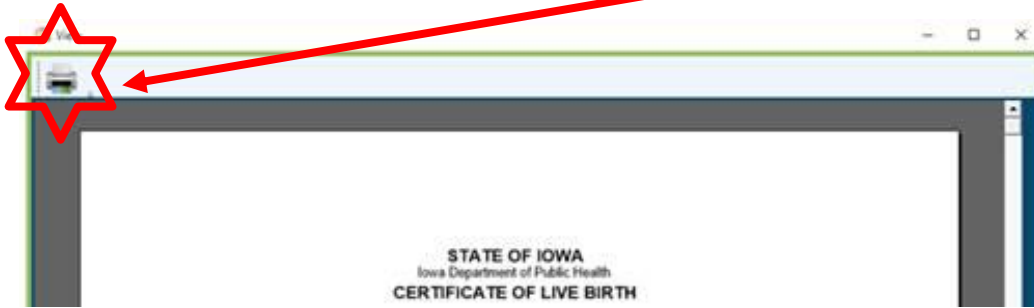
☐ Is high to low?

OK Cancel

If the printer preferences is set to "Requires document sequence prompt", the dialog box will display asking for the safety paper number. Enter the safety paper number(s) and select "OK"

*Note: If more than one document was requested, the user may enter the first safety paper number and the last safety paper number, separated by a comma **OR** just enter the beginning safety paper number (the system will print out the total number of safety paper based on the number of copies you entered in the service.)*

The next screen to appear is the Print Preview screen, once the record is reviewed you can print it from this screen. **(Do Not Select Close)**. When you are ready to print - Click the print icon  in the upper left hand corner. Close the preview screen.



At-a-glance printing steps:

- ✚ Search for Event Record
- ✚ Click on Request/Documents
- ✚ Enter the safety paper number
- ✚ Preview image of certificate
- ✚ Click on the print icon near the upper left hand corner
- ✚ Close preview screen

Request

File Search Fee/CAS Requests/Documents

Service Marital Information Flags

Requested Record Information

Type of Event: MARRIAGE Date of Event or Beginning Date (mm/dd/yyyy): 01/01/1940 End Date - if exact date is known enter here also (mm/dd/yyyy): 09/20/1945

First Name: william Middle Name: Last Name: allen Generational Identifier:

Purpose of Request: Family History Relationship: Genealogy

Service Totals for this request

Total of Services for this Request: 0.00 State Amount: 0.00 Local Amount: 0.00

Service Information

To add a service, click the Add New Service button or click the + (Plus) button.
To change service information, select a row and then change the information in the fields at the top of the paragraph.
To view the details of a service, double click an entry or select an entry and press ENTER key.

Add New Service Service Type: Certified Copy Fee Type: Standard Copies: 1 Status: PENDING Save Service

Event Type	Service Type	Fee Type	Copies	Service Total	Status	Search?	ServiceID
MARRIAGE	Certified Copy	Standard	1	20.00	PENDING	Y	15939
MARRIAGE	Waiver	Standard	1	5.00	PENDING	Y	15980

Services +

Search

Search Request Record

NON-IVES CERTIFICATES

If the request is for a Non-IVES Certificate (*Certain Birth or Marriage*) the user would **not** select the "Search for Event button", instead simply print your documents as you do today using the County Safety Paper and select the Select Requests/Documents > Documents > Non-IVES Certificate(s) from the Menu.

Enter the County safety paper number(s) used in the dialog box and select "OK"

Note: If more than one document was requested, the user may enter the first safety paper number and the last safety paper number, separated by a comma.

Requests/Documents Actions Linking Tools Help

Documents Non-IVES Certificate(s) Notice of Record Search

Information Flags

Input Text

Please enter the beginning document sequence or a range of document sequences separated by a comma.

Is high to low?

OK Cancel

Request

File Search Fee/CAS Requests Actions Linking Tools Help

Service Marital Information Flags

Requested Record Information

Type of Event: DEATH Date of Event or Beginning Date (mm/dd/yyyy): 03/01/2014 End Date - if exact date is known enter here also (mm/dd/yyyy): 03/01/2014

First Name: Joe Middle Name: Last Name: Allen Generational Identifier:

Purpose of Request: Funeral Home Director Relationship: Funeral Home Director

Service Totals for this request

Total of Services for this Request	State Amount	Local Amount
20.00	16.00	4.00

Service Information

To add a service, click the Add New Service button or click the + (Plus) button.
To change service information, select a row and then change the information in the fields at the top of the paragraph.
To view the details of a service, double click an entry or select an entry and press ENTER key.

Add New Service

Service Type: Certified Copy Fee Type: Standard Copies: 1 Status: COMPLETED

Event Type: DEATH Service Type: Certified Copy Fee Type: Standard Copies: 1 Service Total: 20.00 Status: COMPLETED Search?: Y ServiceID: 303

Services

Search

Search for Event Record

System

Request Status: COMPLETED Date Status Changed: 03/29/2014 Changed By: JATEST J. RECORDER POLK Applicant ID: 103 Request Queue Assignment: Pending Tracking Number (Ups/Vc/FedEx):

Location Code: CNTY-077 User Location Description: Polk

Event data was saved. 0 Alerts

After user has completed processing all the requests for the Service.

Click **SAVE**

The statuses should all change to "Completed".

Applicant

File Search Fee/CAS Requests/Documents Actions Work Queue Linking Tools Help

Application Mailing Billing Flags Reassign Request Refund/Return/Info

Application Status

Applicant Number: 10548 Date of Application (mm/dd/yyyy): 07/16/2015 Application Type: Counter Assigned to (Queue): PENDING Priority: NORMAL

Identification: Drivers License

Applicant Information

First Name: sam Last Name: nichols

Country: United States State Name: Iowa City:

Address 1: Address 2 (optional): Zipcode:

Phone (Primary): (***).***.**** Fax (if applicable): (***).***.**** Email: Is Applicant Address same as mailing? ☒

Services

Total Amount Charged: 90.00 Total Amount Paid: 100.00 Customer Overpaid: (10.00) State Amount: 69.00 Local Amount: 21.00

Request and Payment Information

You must save the record before trying to add a new request or payment the first time. (The Applicant Number must be present)

Requests

Event	First Name	Last Name	Status	Total	Assigned To
DEATH	mark	Anderson	COMPLETED	65.00	
MARRIAGE	william	allen	COMPLETED	25.00	

Payments

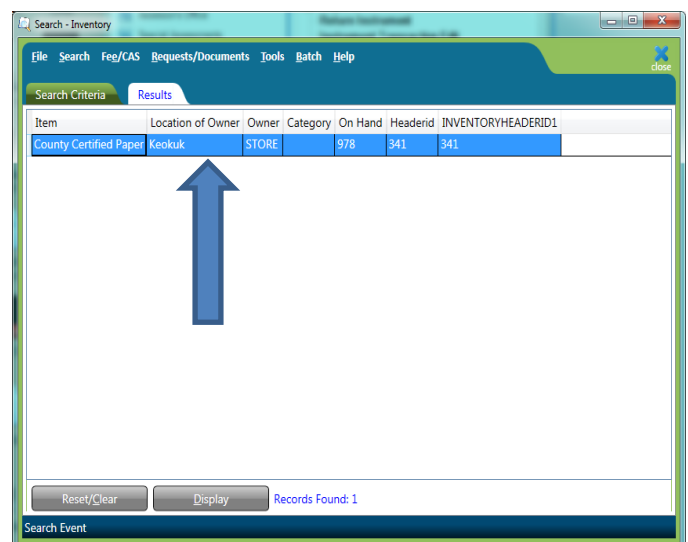
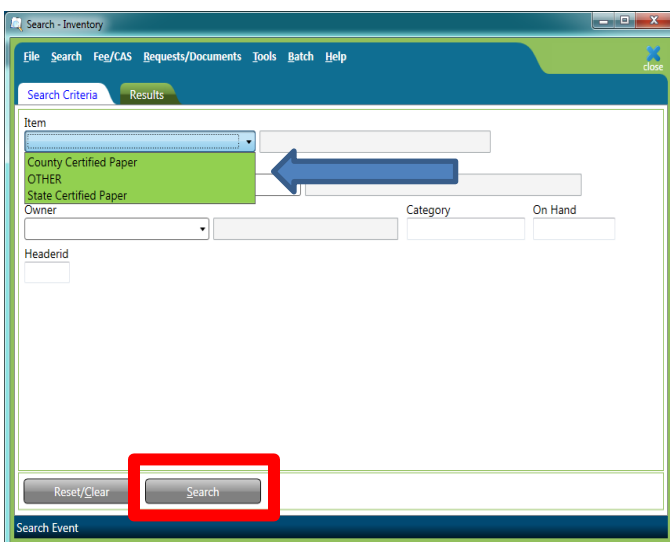
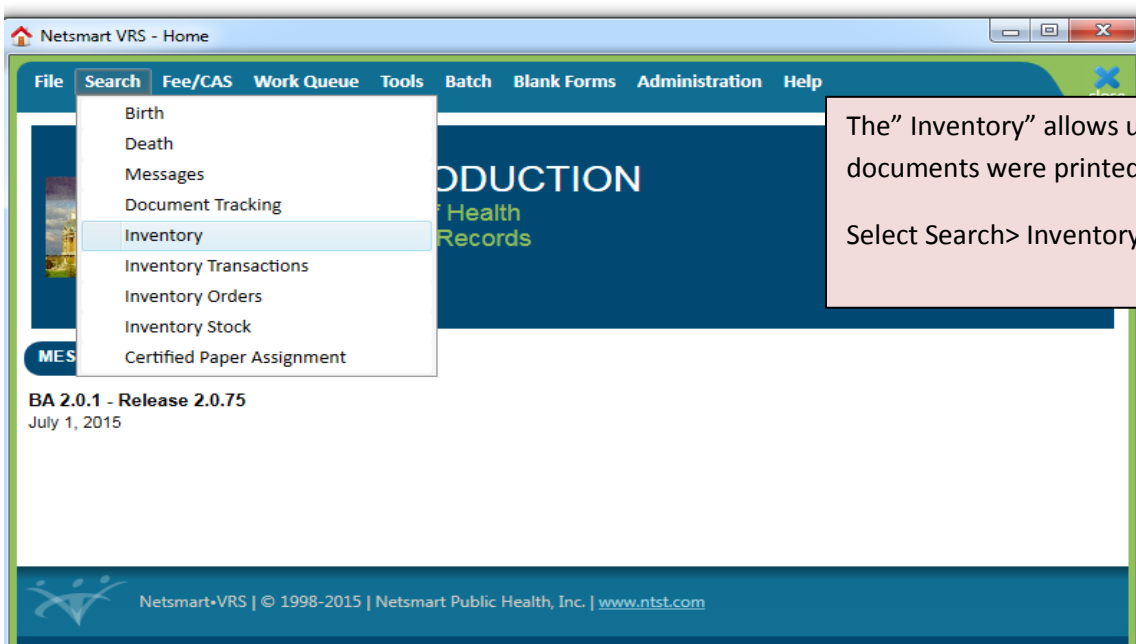
Payment Date	Payment Type	Check Num	Amount	Receipt No	Returned	Pay
7/16/2015	CASH		100.00	10548		85

Close the Service and return to the Application tab.

In order to complete the transaction in full, you are required to manually change the status of the application. Under Application Status, change the Status from PENDING to COMPLETED and enter the Date of Completed. Click SAVE (COMPLETED appears in the Status box, Date Completed filled, and name appears in the Completed By box)

Close application

Damaging Spoiled Safety Paper



- 1) In the search grid, choose the type of paper and click Search at the bottom.
- 2) The HeaderID for the paper will appear, double click on it OR click on the Display box to open Inventory.

Marking "Available" Paper as DAMAGED

Inventory (Event Year = 2014)

File Search Fee/CAS Requests/Documents Actions Linking Tools Administration Help

Item Information Skipped Stock System

Item Headerid Item Location of Owner Owner
2 State Certified Paper Central Location OTHER

Item Description General Category (PAPER, FORMS, PENCILS...) Unit (Pack/Box/Ream...) Count per unit
State Certified Paper 1722001-1725000 IVES EACH 500

Summary

Quantity Ordered	Quantity Received	Quantity Shipped	Quantity Available
0	5125	0	-583

Available in Stock

Item	Part Desc	Quantity	Start	End	StockID
State Certified Paper	1	1722049	1722049	51	
State Certified Paper	1	1722050	1722050	52	
State Certified Paper	1	1722071	1722071	73	
State Certified Paper	1	1722072	1722072	74	
State Certified Paper	1	1722073	1722073	75	
State Certified Paper	1	1722144	1722144	146	
State Certified Paper	1	1722150	1722150	152	
State Certified Paper	1	1722152	1722152	154	
State Certified Paper	1	1722216	1722216	218	
State Certified Paper	1	1722220	1722220	222	
State Certified Paper	1	1722238	1722238	240	
State Certified Paper	1	1722274	1722274	276	

Transaction Details

Item	Part Desc	Date	Transaction	Quantity	Start	End	Ship To	Notes
State Certified Paper		4/21/2014	RECEIVE	500	1722001	1722500		
State Certified Paper		4/21/2014	SPLIT-ALL-TO-STOCK	500	1722001	1722500		
State Certified Paper		4/21/2014	USE	1	1722001	1722001		D Death Ce
State Certified Paper		4/21/2014	USE	1	1722002	1722002		D Death Ce
State Certified Paper		4/21/2014	USE	1	1722003	1722003		D Death Ce
State Certified Paper		4/21/2014	USE	1	1722004	1722004		D Death Ce
State Certified Paper		4/21/2014	USE	1	1722021	1722021		Non-IVES C
State Certified Paper		4/22/2014	USE	1	1722041	1722041		Non-IVES C

Editing an existing event. 0 Alerts:

If the paper appears in the Available in Stock Grid:

Click **one time** on the control number you need to Damage this will highlight the line. Then click the sign under Transaction Details. The transaction page will appear.

Inventory Transactions (Event Year = 2013)

File Search Fee/CAS Requests/Documents Actions Linking Tools Administration Help

Transactions System

Item Information

Item User Location Person Assigned
State Certified Paper Central Location STORE

Transaction

Transaction Date Transaction
02/10/2016 DAMAGED

Quantity Begin number End
1 1700915 1700915

Notes
This paper was damaged-jammed in printer-- or printed wrong cert - ETC

Status Void Transaction Send to Userlocation

Split stock into smaller number ranges

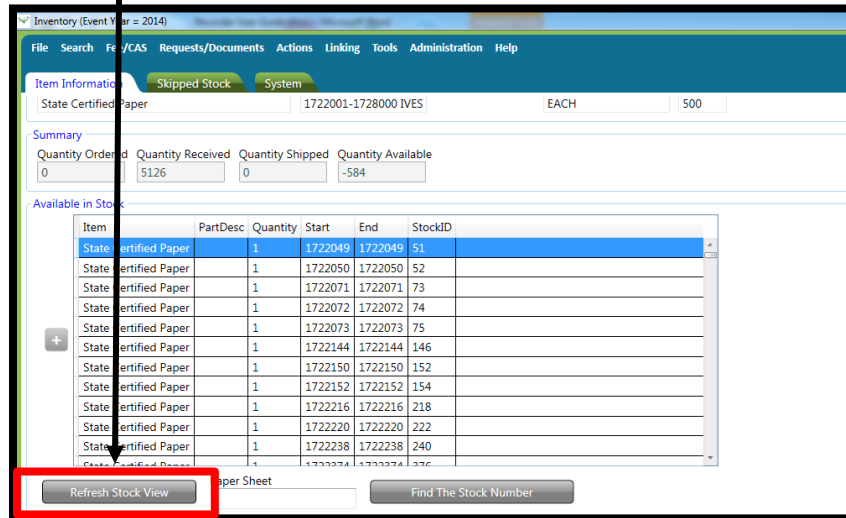
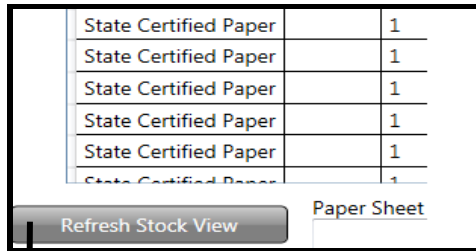
Count	Start	End

Adding a new event. 0 Alerts:

Enter Transaction Date, choose Transaction type DAMAGED, and click **"Pull Info from selected Stock"**. *The quantity and Begin/End number will automatically pull from the previous screen.* You can also enter a note.

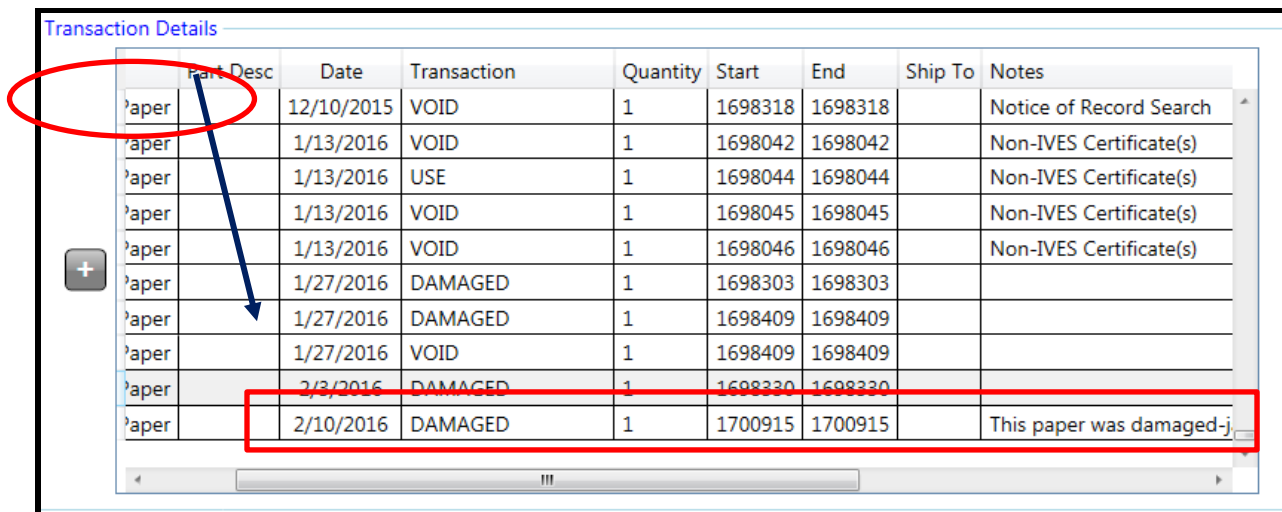
Click **Save and Close**.

Click on Refresh Stock View – this up refresh your screen.



Once you select "Refresh Stock View" The Transaction Details Grid will reflect this action.

Your damaged paper now shows in the Transaction Grid.



Marking “USED” paper as DAMAGED

Available in Stock


Item	PartDesc	Quantity	Start	End	StockID
State Certified Paper		1	1698394	1698394	600
State Certified Paper		1	1698403	1698403	609
State Certified Paper		1	1698420	1698420	626
State Certified Paper		1	1698425	1698425	631
State Certified Paper		1	1698497	1698497	703
State Certified Paper		1	1698515	1698515	730
State Certified Paper		1	1698549	1698549	764
State Certified Paper		1	1698566	1698566	781
State Certified Paper		1	1698567	1698567	782
State Certified Paper		1	1698574	1698574	789
State Certified Paper		1	1698593	1698593	808
State Certified Paper		1	1698611	1698611	826

Refresh Stock View Paper Sheet Find The Stock Number

Transaction Details

Item	Part Desc	Date	Transaction	Quantity	Start	End	Ship To	Notes
State Certified Paper		5/2/2014	USE	1	1700912	1700912		Non-IVES C
State Certified Paper		5/2/2014	USE	1	1700913	1700913		Non-IVES C
State Certified Paper		5/2/2014	USE	1	1700914	1700914		Non-IVES C
State Certified Paper		5/2/2014	USE	1	1700915	1700915		Non-IVES C
State Certified Paper		5/2/2014	USE	1	1700852	1700852		Non-IVES C
State Certified Paper		5/2/2014	USE	1	1700853	1700853		Non-IVES C
State Certified Paper		5/2/2014	USE	1	1700854	1700854		Non-IVES C
State Certified Paper		5/2/2014	USE	1	1700916	1700916		Non-IVES C
State Certified Paper		5/2/2014	USE	1	1700918	1700918		Non-IVES C
State Certified Paper		5/2/2014	USE	1	1700919	1700919		Non-IVES C
State Certified Paper		5/2/2014	USE	1	1700933	1700933		Non-IVES C

If the paper appears in the bottom Transaction Details Grid:

Click **one time** on the control number you need to Damage this will highlight the line. Then click the  sign under Transaction Details. The transaction page will appear.

Inventory Transactions (Event Year = 2013)

File Search Fee/CAS Requests/Documents Actions Linking Tools Administration Help

Transactions System

Item Information

Item: State Certified Paper User Location: Central Location Person Assigned: STORE

Transaction

Transaction Date: 7/7 Transaction: Pull info from Selected Stock Part or Desc:

Quantity: 0 Begin number: 0 End: 0

Notes:

Status: Void Transaction Send to Userlocation:

Split stock into smaller number ranges

Count: Start: End:

Count: Start: End:

Adding a new event. 0 Alerts:

The Transaction window opens.

Inventory Transactions (Event Year = 2013)

File Search Fee/CAS Requests/Documents Actions Linking Tools Administration Help

Transactions System

Item Information

Item: State Certified Paper User Location: Central Location Person Assigned: STORE

Transaction

Transaction Date: 02/10/2016 Transaction: DAMAGED Pull info from Selected Stock Part or Desc:

Quantity: 1 Begin number: 1700915 End: 1700915

Notes

This paper was damaged-jammed in printer-- or printed wrong cert - ETC

Status: Void Transaction Send to Userlocation:


Split stock into smaller number ranges

Count Start End

Count Start End

Adding a new event. 0 Alerts:

Enter the Transaction information: Date, Transaction Type is (DAMAGED), Quantity, Begin number and End number. Add a note if you wish.

- Click on **Save** in the Upper Right-hand corner
- You will get a new screen that says "Saving the Event"
- The fields on the Transaction screen will change to Grey and show the Status as COMPLETED
- Click Close 

Inventory Transactions (Event Year = 2013)

File Search Fee/CAS Requests/Documents Actions Linking Tools Administration Help

Transactions System

Item Information

Item: State Certified Paper User Location: Central Location Person Assigned: STORE

Transaction

Transaction Date: 02/10/2016 Transaction: DAMAGED Pull info from Selected Stock Part or Desc:

Quantity: 1 Begin number: 1700915 End: 1700915

Notes

This paper was damaged-jammed in printer-- or printed wrong cert - ETC.

Status: COMPLETED Void Transaction Send to Userlocation:

Split stock into smaller number ranges

Count Start End

Count Start End

Event data was saved. 0 Alerts:

✚ Click on Refresh Stock View – this up refresh your screen.

State Certified Paper		1
State Certified Paper		1
State Certified Paper		1
State Certified Paper		1
State Certified Paper		1
State Certified Paper		1

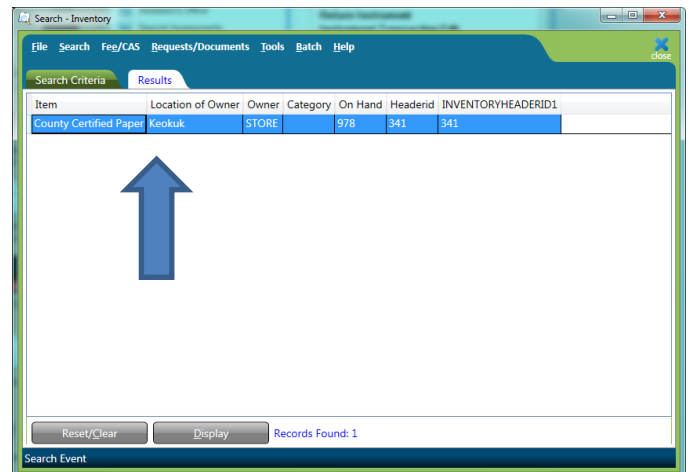
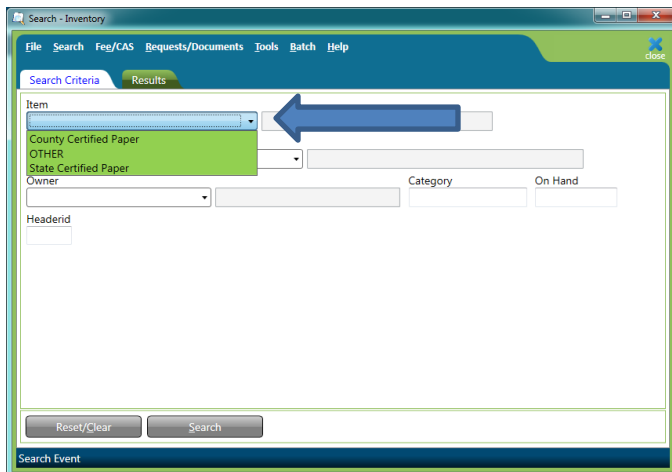
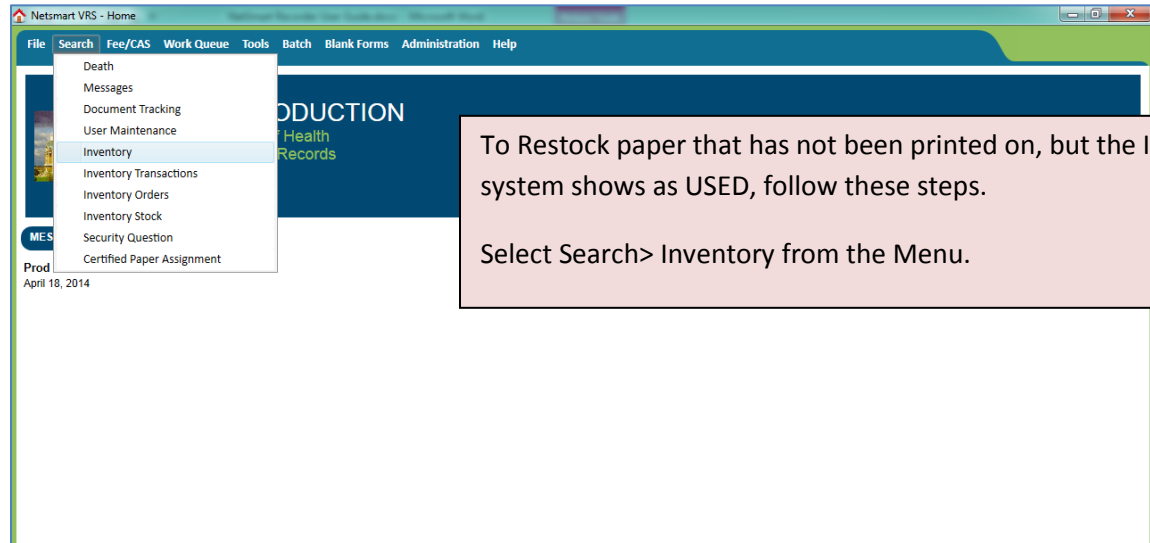
Refresh Stock View

Paper Sheet

- ✚ Once you select **Refresh Stock View** The Transaction Details Grid will reflect this action.
- ✚ Your damaged paper now shows in the Transaction Grid.

Transaction Details								
	Part Desc	Date	Transaction	Quantity	Start	End	Ship To	Notes
	Paper	12/10/2015	VOID	1	1698318	1698318		Notice of Record Search
	Paper	1/13/2016	VOID	1	1698042	1698042		Non-IVES Certificate(s)
	Paper	1/13/2016	USE	1	1698044	1698044		Non-IVES Certificate(s)
	Paper	1/13/2016	VOID	1	1698045	1698045		Non-IVES Certificate(s)
	Paper	1/13/2016	VOID	1	1698046	1698046		Non-IVES Certificate(s)
	Paper	1/27/2016	DAMAGED	1	1698303	1698303		
	Paper	1/27/2016	DAMAGED	1	1698409	1698409		
	Paper	1/27/2016	VOID	1	1698409	1698409		
	Paper	2/3/2016	DAMAGED	1	1698330	1698330		
	Paper	2/10/2016	DAMAGED	1	1700915	1700915		This paper was damaged-j

Restocking Paper



- 1) In the search grid, choose the type of paper and click Search at the bottom.
- 2) The HeaderID for the paper will appear, double click to open Inventory.

999000-999800 EACH

Summary

Quantity Ordered	Quantity Received	Quantity Shipped	Quantity Available
0	801	0	780

Available in Stock

Item	Part Desc	Quantity	Start	End	StockID
State Certified Paper		1	999022	999022	367215
State Certified Paper		1	999023	999023	367216
State Certified Paper		1	999024	999024	367217
State Certified Paper		1	999025	999025	367218
State Certified Paper		1	999026	999026	367219
State Certified Paper		1	999027	999027	367220
State Certified Paper		1	999028	999028	367221
State Certified Paper		1	999029	999029	367222
State Certified Paper		1	999030	999030	367223
State Certified Paper		1	999031	999031	367224
State Certified Paper		1	999032	999032	367225
State Certified Paper		1	999033	999033	367226

Refresh Stock View Paper Sheet 999012 Find The Stock Number

Transaction Details

Item	Part Desc	Date	Transaction	Quantity	Start	End	Ship To	Notes
State Certified Paper		3/2/2016	RECEIVE	801	999000	999800		

*Note: Restocking paper is a **Two-Step** process. The paper number must be Voided first, then you enter paper again to Restock it.*

Enter the Paper Sheet you want to work with, click Find the Stock Number.

You will get a Pop-up that says "Not in Top Grid" click Ok.

The piece of paper will be **highlighted** and appear with a Transaction type of **USE** in the **Transaction Details Grid**.

Double click the line of the paper that you wish to restock in the Transaction Details. The Inventory Transaction page will appear.

Inventory (Event Year = 2014)

File Search Fee/CAS Requests/Documents Actions Linking Tools Administration Help

Item Information Skipped Stock System

Item Description: State Certified Paper General Category (PAPER, FORMS, PENCILS...): 1722001-1728000 IVES Unit (Pack/Box/Ream...): EACH Count per unit: 500

Summary

Quantity Ordered	Quantity Received	Quantity Shipped	Quantity Available
0	5126	0	-586

Available in Stock

Item	Part Desc	Quantity	Start	End	StockID
State Certified Paper		1	1722049	1722049	51
State Certified Paper		1	1722050	1722050	52
State Certified Paper		1	1722071	1722071	73
State Certified Paper		1	1722072	1722072	74
State Certified Paper		1	1722073	1722073	75
State Certified Paper		1	1722144	1722144	146
State Certified Paper		1	1722150	1722150	152
State Certified Paper		1	1722152	1722152	154
State Certified Paper		1	1722216	1722216	218
State Certified Paper		1	1722220	1722220	222
State Certified Paper		1	1722238	1722238	240
State Certified Paper		1	1722234	1722234	236

Refresh Stock View Paper Sheet Find The Stock Number

Transaction Details

Item	Part Desc	Date	Transaction	Quantity	Start	End	Ship To	Notes
State Certified Paper		3/4/2015	USE	1	1723641	1723641		D Death Ir
State Certified Paper		3/4/2015	USE	1	1723642	1723642		D Death C
State Certified Paper		3/4/2015	USE	1	1723594	1723594		D Death Ir
State Certified Paper		3/4/2015	USE	1	1723595	1723595		D Death Ir
State Certified Paper		3/4/2015	USE	1	1723616	1723616		D Death C
State Certified Paper		3/4/2015	USE	1	1723617	1723617		D Death Ir
State Certified Paper		3/4/2015	USE	1	1723618	1723618		D Death C
State Certified Paper		3/4/2015	USE	1	1723619	1723619		D Death C
State Certified Paper		3/4/2015	USE	1	1723620	1723620		D Death C
State Certified Paper		3/4/2015	USE	1	1723621	1723621		D Death C
State Certified Paper		3/4/2015	USE	1	1723622	1723622		D Death C

Editing an existing event. 0 Alerts

Inventory Transactions (Event Year = 2013)

File Search Fee/CAS Requests/Documents Actions Linking Tools Administration Help

Transactions System

Item Information

Item: State Certified Paper User Location: Central Location Person Assigned: STORE

Transaction

Transaction Date: 10/14/2016 Transaction: USE Pull info from Selected Stock Part or Desc:

Quantity: 1 Begin number: 999020 End: 999020

Notes: Non-IVES Certificate(s)

Status: Void Transaction Send to Userlocation

Split stock into smaller number ranges

Count Start End

Count Start End

Editing an existing event. 0 Alerts

Make sure to review your information.

Click on

Void Transaction

The Transaction changes from USE to VOID and the information will be greyed out.

After you do your Save, the Status will be COMPLETED.

Save>Close

Inventory Transactions (Event Year = 2013)

File Search Fee/CAS Requests/Documents Actions Linking Tools Administration Help

Transactions System

Item Information

Item: State Certified Paper User Location: Central Location Person Assigned: STORE

Transaction

Transaction Date: 10/14/2016 Transaction: VOID Pull info from Selected Stock Part or Desc:

Quantity: 1 Begin number: 999020 End: 999020

Notes: Non-IVES Certificate(s)

Status: COMPLETED Void Transaction Send to Userlocation

Split stock into smaller number ranges

Count Start End

Count Start End

Event data was saved. 0 Alerts

Inventory (Event Year = 2014)

File Search Fee/CAS Requests/Documents Actions Linking Tools Help

Item Information System

Item
Headerid Item Location of Owner Owner
341 County Certified Paper Keokuk OTHER STORE

Item Description General Category (PAPER, FORMS, PENCILS...) Unit (Pack/Box/Ream...) Count per unit
County Certified Paper EACH

Summary
Quantity Ordered Quantity Received Quantity Shipped Quantity Available
0 987 0 950

Available in Stock


Item	PartDesc	Quantity	Start	End	StockID
County Certified Paper	1	4154051	4154051	263483	
County Certified Paper	1	4154052	4154052	263484	
County Certified Paper	1	4154053	4154053	263485	
County Certified Paper	1	4154054	4154054	263486	
County Certified Paper	1	4154055	4154055	263487	
County Certified Paper	1	4154056	4154056	263488	
County Certified Paper	1	4154057	4154057	263489	
County Certified Paper	1	4154058	4154058	263490	
County Certified Paper	1	4154059	4154059	263491	
County Certified Paper	1	4154060	4154060	263492	
County Certified Paper	1	4154061	4154061	263493	

Refresh Stock View

Transaction Details

Part Desc	Date	Transaction	Quantity	Start	End	Ship To	Notes
County Certified Paper	4/22/2014	VOID	1	4154020	4154020		Non-IVES
County Certified Paper	4/22/2014	VOID	1	4154021	4154021		Non-IVES
County Certified Paper	4/22/2014	USE	1	4154018	4154018		Non-IVES
County Certified Paper	4/22/2014	USE	1	4154022	4154022		Non-IVES
County Certified Paper	4/25/2014	USE	1	4154023	4154023		Non-IVES
County Certified Paper	4/28/2014	USE	1	4154024	4154024		Non-IVES
County Certified Paper	4/28/2014	USE	1	4154025	4154025		Non-IVES
County Certified Paper	4/28/2014	USE	1	4154026	4154026		Non-IVES
County Certified Paper	4/28/2014	USE	1	4154027	4154027		Non-IVES
County Certified Paper	4/28/2014	USE	1	4154028	4154028		Non-IVES
County Certified Paper	4/28/2014	USE	1	4154029	4154029		Non-IVES

Editing an existing event. 0 Alerts:

From the Inventory page, click the  under **Transaction Details**, and the Inventory Transaction window will appear.

Inventory Transactions (Event Year = 2013)

File Search Fee/CAS Requests/Documents Actions Linking Tools Help

Transactions System

Item Information
Item User Location Person Ass
State Certified Paper Story STORE

Transaction
Transaction Date Transaction
08/04/2015 RESTOCK Pull info from Selected Stock Part or Desc

Quantity Begin number End
4 4772541 4772544

Notes

Send to Userlocation

Split stock into smaller number ranges

Count	Start	End

Editing an existing event. 0 Alerts:

Enter the date, Transaction Type RESTOCK, the quantity, Beginning and ending control number.

Save>Close.

You can enter a series of numbers. Make sure the quantity matches the total number of control numbers

Inventory (Event Year = 2015)

File Search Fee/CAS Requests/Documents Actions Linking Tools Help

Item Information Skipped Stock System

State Certified Paper EACH

Summary

Quantity Ordered	Quantity Received	Quantity Shipped	Quantity Available
0	4004	0	3959

Available in Stock

Item	PartDesc	Quantity	Start	End	StockID
State Certified Paper		1	4775225	4775225	247749
State Certified Paper		1	4775226	4775226	247750
State Certified Paper		1	4775227	4775227	247751
State Certified Paper		1	4775228	4775228	247752
State Certified Paper		1	4775229	4775229	247753
State Certified Paper		1	4775230	4775230	247754
State Certified Paper		1	4775231	4775231	247755
State Certified Paper		1	4775232	4775232	247756
State Certified Paper		1	4775233	4775233	247757
State Certified Paper		1	4775234	4775234	247758
State Certified Paper		4	4772541	4772544	366165

Refresh Stock View Paper Sheet Find The Stock Number

Transaction Details


Item	Part Desc	Date	Transaction	Quantity	Start	End	Ship To	Notes
State Certified Paper		5/6/2014	USE	1	4772538	4772538		D Death Ce
State Certified Paper		5/6/2014	USE	1	4772539	4772539		D Death Ce
State Certified Paper		5/6/2014	USE	1	4772540	4772540		D Death Ce
State Certified Paper		5/6/2014	VOID	1	4772541	4772541		D Death Ce
State Certified Paper		5/6/2014	VOID	1	4772542	4772542		D Death Ce
State Certified Paper		5/6/2014	VOID	1	4772543	4772543		D Death Ce
State Certified Paper		5/6/2014	VOID	1	4772544	4772544		D Death Ce
State Certified Paper		5/6/2015	USE	1	4772545	4772545		Notice of R
State Certified Paper		5/6/2015	USE	1	4772546	4772546		Death VA C
State Certified Paper		8/4/2015	RESTOCK	4	4772541	4772544		

Editing an existing event. 0 Alerts:

Click Refresh Stock View, and **AT THE BOTTOM** of the Available in Stock, your paper is restocked.

If you restocked multiple papers

Click one time to highlight the line that you just restocked in the Available in Stock.

Click the  under Transaction Details and the Inventory Transaction window will appear.

Inventory Transactions (Event Year = 2013)

File Search Fee/CAS Requests/Documents Actions Linking Tools Help

Transactions System

Item Information

Item: State Certified Paper User Location: Story Person Assigned: STORE

Transaction

Transaction Date: 08/04/2015 Transaction: SPLIT-ALL-TO-STOCK Pull info from Selected Stock Part or Desc:

Quantity: 4 Begin number: 4772541 End: 4772544

Notes:

Send to Userlocation:

Split stock into smaller number ranges

Count	Start	End
Count	Start	End

Adding a new event. 0 Alerts:

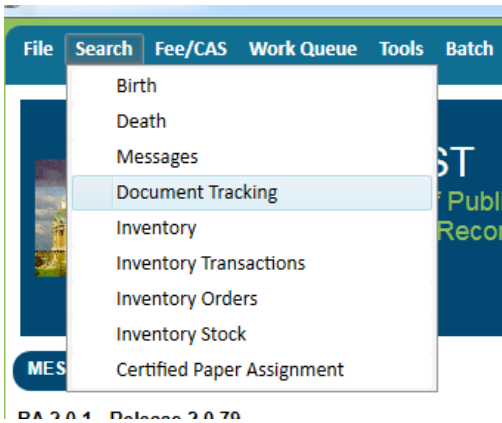
Enter the date, Transaction Type SPLIT-ALL-TO-STOCK, and Click **Pull info from Selected Stock**.

The Quantity, beginning and end number will appear.

Save>Close.

Click Refresh Stock View, Save>Close.

Safety Paper Tracking



Users can also monitor what safety paper goes with the application and who processed the application.

Select Search> Document Tracking from the Menu.

Note: Document Tracking can also be found under Actions menu when you have the application up.

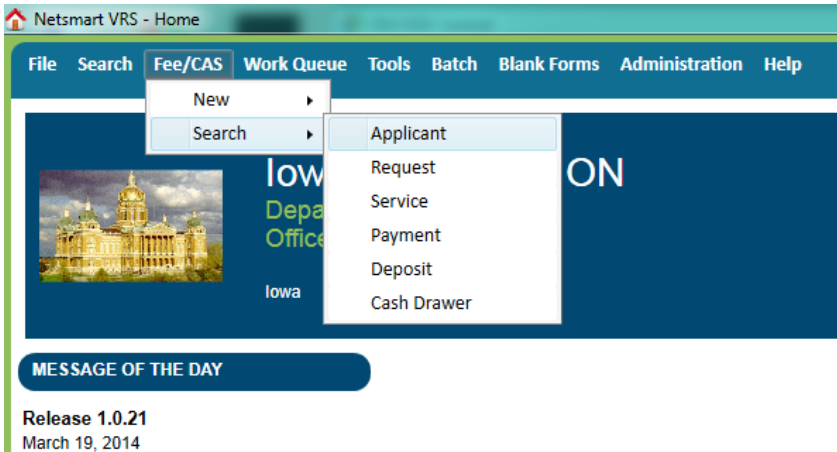
Enter the information you have in the fields and Search.

State File Number	System field	Event Year	Document Name Printed	Date Printed	Type Paper	Begin Document Num (press F1)
2014005858		2014	D Death Certificate	5/6/2014		4772541

Results will give you the state file number of the record, the document name , document number(s) that is associated with the application, the person who printed the record, the applicant ID, etc.

Click on Display and it will bring up the application.

Search for an Application - Processed



From the IVES Home Screen,
Click Fee/CAS > Search > Applicant

Search - Applicant

File Search Fee/CAS Requests Work Queue Tools Batch Help

Search Criteria Results

Date Application Applicant Number Status Priority

Applicant First Name Last Name

Company/Agency Name Phone Bad Check Warning

Application Type Returned Mail Refund Date Mail City Alert Count Refund Sent to Fiscal

Assigned to (Queue) Invoice HeaderID Assignment to other location Amount Due User location Code

Reset/Clear Search

Fill in the Date of the Application you are searching for.

Click Search at the bottom.

Search - Applicant

File Search Fee/CAS Requests Work Queue Tools Batch Help

Search Criteria Results

Date Application	Applicant Number	Status	Priority	Applicant First Name	Last Name	Company/Agency Name	Phone	Bad Check Warning	Application Type	Return Status
3/26/2014	148	COMPLETED	NORMAL	MELISSA	BIRD			N	Counter	N
3/26/2014	151	COMPLETED	NORMAL	MELISSA	BIRD			N	Counter	N
3/26/2014	154	COMPLETED	NORMAL	MELISSA	BIRD			N	Counter	N
3/26/2014	162	COMPLETED	NORMAL	MELISSA	BIRD			N	Counter	N
3/26/2014	165	COMPLETED	NORMAL	MELISSA	BIRD			N	Counter	N
3/26/2014	170	COMPLETED	NORMAL	MELISSA	BIRD			N	Counter	N
3/26/2014	171	COMPLETED	NORMAL	MELISSA	BIRD			N	Counter	N
3/26/2014	174	COMPLETED	NORMAL	MELISSA	BIRD			N	Counter	N
3/26/2014	175	COMPLETED	NORMAL	MEL	BIRD			N	Mail	N
3/26/2014	176	COMPLETED	NORMAL	MELISSA	BIRD			N	Counter	N
3/26/2014	177	COMPLETED	NORMAL	MEL	BIRD			N	Counter	N
3/26/2014	178	COMPLETED	NORMAL	KELSEY	BAYLISS			N	Counter	N
3/26/2014	179	COMPLETED	NORMAL	DAWN	GOLDMAN			N	Counter	N
3/26/2014	192	COMPLETED	NORMAL	JOE	SMITH			N	Counter	N

You will see a grid of all the applications that meet the search criteria. The Columns can be rearranged simply by high lighting the top column title and dragging to the desired location.

Double click to open and review the application.

Click Close when finished.

Cancelling a Service Request

Service Totals for this request

Total of Services for this Request	State Amount	Local Amount
40.00	32.00	8.00

Service Information

To add a service, click the Add New Service button or click the + (Plus) button.
 To change service information, select a row and then change the information in the fields at the top of the paragraph.
 To view the details of a service, double click an entry or select an entry and press ENTER key.

Add New Service Service Type: Plain Paper Copy Fee Type: Standard Copies: 0 Status: CANCELLED **Save Service**

Event Type	Service Type	Fee Type	Copies	Service Total	Status	Search?	ServiceID
BIRTH	Certified Copy	Standard	2	40.00	PENDING	Y	34
BIRTH	Plain Paper Copy	Standard	0	0.00	CANCELLED	Y	35

To cancel a request and remove the fee amount, change the Status to **CANCELLED**, the system will change the number of copies to **0**

➔ Click **Save Service Button** for the change in Service Totals for this request to take.

Cancelling an Application and Removing Fee

Applicant

File Search Fee/CAS Requests/Documents Actions Work Queue Linking Tools Help

Application Mailing Billing Flags Reassign Request Refund/Return/Info

Application Status

Applicant Number: 10568 Date of Application (mm/dd/yyyy): 08/04/2015 Application Type: Counter Assigned to (Queue): PENDING Priority: NORMAL

Identification: Drivers License Status: PENDING Date Completed (mm/dd/yyyy): / / Completed By:

Applicant Information

First Name: Jimmy Last Name: Johns Company/Agency Name:

Country: United States State Name: Iowa City: WAUKEE

Address 1: 123 CHERRY LANE Address 2 (optional): Zipcode: 50263

Phone (Primary): (***-***-****) Fax (if applicable): (***-***-****) Email: Is Applicant Address same as mailing? ☒

Services

Total Amount Charged	Total Amount Paid	= Amount Due	State Amount	Local Amount
20.00	20.00	0.00	16.00	4.00

Request and Payment Information

You must save the record before trying to add a new request or payment the first time. (The Applicant Number must be present)

Requests **Payments**

Event	First Name	Last Name	Status	Total	Assigned To
DEATH	Nancy	Miller	COMPLETED	20.00	

Payment Date	Payment Type	Check Num	Amount	Receipt No	Returned	Pay
8/4/2015	CASH		20.00	10568		855

Open the application you wish to cancel.

If there is a payment, open the payment line item by double clicking on the payment line and change the payment amount \$0.

Note: if the payment type was check or money order, it must be changed to "cash" then enter \$0.

Request

File Search Fee/CAS Requests/Documents Actions Linking Tools Help

Service Marital Information Flags

Requested Record Information

Type of Event: DEATH Date of Event or Beginning Date (mm/dd/yyyy): 04/24/2014 End Date - if exact date is known enter here also (mm/dd/yyyy): 04/24/2014

First Name: Mildred Middle Name: Last Name: Bombei Generational Identifier:

Purpose of Request: Funeral Home Director Relationship: Funeral Home Director

Service Totals for this request

Total of Services for this Request	State Amount	Local Amount
80.00	64.00	16.00

Service Information

To add a service, click the Add New Service button or click the + (Plus) button.
To change service information, select a row and then change the information in the fields at the top of the paragraph.
To view the details of a service, double click an entry or select an entry and press ENTER key.

Add New Service Service Type: Certified Copy Fee Type: Standard Copies: 0 Status: COMPLETED

Save Service

Event Type	Service Type	Fee Type	Copies	Service Total	Status	Search?
DEATH	Certified Copy	Standard	4	80.00	COMPLETED	Y

Services +

COMPLETED
CANCELLED
COMPLETED
COUNTY SEARCH
PENDING
PRINTED
RECORD NOT FOUND
VOID

If there is a Request, open the Request line item by clicking the line in the grid change the service status to either VOID or CANCELLED.

Save Service.

Save>Close.

Applicant

File Search Fee/CAS Requests/Documents Actions Work Queue Linking Tools Help

Application Mailing Billing Flags Reassign Request Refund/Return/Info

Application Status

Applicant Number: 17261 Date of Application (mm/dd/yyyy): 05/21/2014 Application Type: FH - Pickup Assigned to (Queue): COUNTY FH PENDING Priority: NORMAL

Identification: Status: PENDING Date Completed (mm/dd/yyyy): / / Completed By:

Applicant Information

First Name: Lyle Duane Last Name: Donald

Country: United States State Name: Iowa City: Keota

Address 1: 203 South Green Street Address 2 (optional): Zipcode: 52248

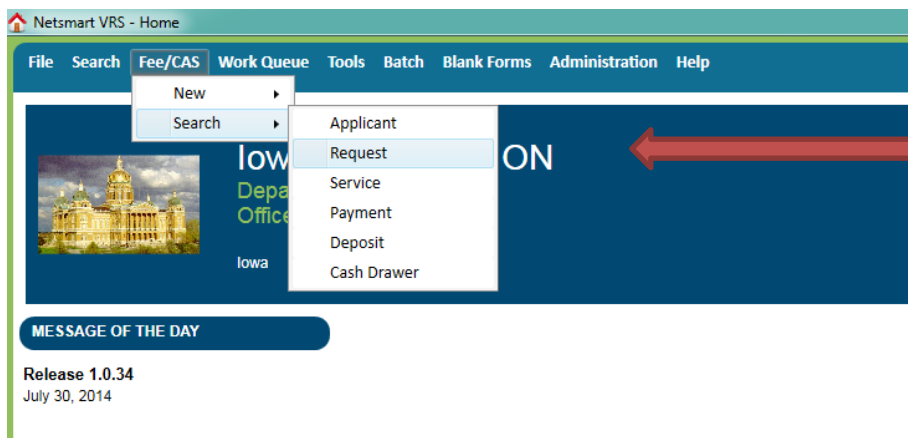
ABANDONED
CANCELLED
CLOSED
COMPLETED
PENDING
SPECIAL
VOID

Change the Status of the application to either CANCELLED or VOID

Save>Close.

Exchanging Certified Copies

NOTE: You can only exchange certified copies (state or county) issued from your county. DO NOT CHANGE THE TRANSACTION TYPE OF EXCHANGED PAPER TO VOID IN INVENTORY.



From the IVES Home screen, FEE/CAS>Search>Request.

The Request information is the person of record. Complete the requested parties information (should match the certified copy information that you are exchanging.)

First Name	Middle Name	Last Name	Date of Event	Type of Event	Request Status	Request Q
john		dalton	2/13/2014	DEATH	COMPLETED	
john		Dalton	2/13/2014	DEATH	COMPLETED	
john		dalton	2/13/2014	DEATH	CANCELLED	

Double click the request in which you are exchanging.

NOTE: You may have more than one result. If that happens, you will need to open each request and cross-reference the applicant information at the bottom of the request page.

Request

File Search Fee/CAS Requests/Documents Actions Linking Tools Help

Service Marital Information Flags

Requested Record Information

Type of Event: DEATH Date of Event or Beginning Date (mm/dd/yyyy): 02/13/2014 End Date - if exact date is known enter here also (mm/dd/yyyy): 02/13/2014

First Name: john Middle Name: Last Name: dalton Generational Identifier:

Purpose of Request: Family History Relationship: Daughter, Step

Service Totals for this request

Total of Services for this Request: 0.00 State Amount: 0.00 Local Amount: 0.00

Service Information

To add a service, click the Add New Service button or click the + (Plus) button.
To change service information, select a row and then change the information in the fields at the top of the paragraph.

Add New Service Service Type: Certified Copy Fee Type: Exchange Copies: 1 Status: PENDING Save Service

Services	+	Event	Service Type	Fee Type	No Fee	Copies	Amount	Status	Y	Number
DEATH		Plain Paper Copy	No Fee	1	0.00	COMPLETED	Y	26		
DEATH		Certified Copy	Exchange	2	0.00	CANCELLED	Y	118521		
DEATH		Certified Copy	Exchange	1	0.00	PENDING	Y	124044		

Search

Search for Event Record

System

Request Status: COMPLETED Date Status Changed: 04/21/2014 Changed By: Bird, Melissa R. Applicant ID: 29 Request Queue Assignment: Tracking Number:

Location Code: CNTY-054 User Location Description: Keokuk

Editing an existing event. 0 Alerts:

On the Request page, click ADD NEW SERVICE, choose service Type, Fee Type will be EXCHANGED, complete the number of copies, and Save Service.

Note: make sure that the correct Service line is highlighted in the Service Information grid.

Click search for event record. Finish the verification and printing process. In the print-prompt box, enter the number for the certified paper you are currently using.

Save and Close.

If you are exchanging paper that was issued before April 21, 2014, enter as a new application, and use fee type Exchanged.

Accounting Reports

Netsmart Technologies Report Center

File Help

Available Reports

- AUDIT
- CORRACCT
- ACH Weekly Fiscal Rpt
- Payment Totals
- Service Totals

Report ID: Service Totals

Report Name: ACH Service Totals for Counties

Description:

Report Type: Report Builder

Parameter Set:

Service Date Range

Userlocation Description @USERLOC

Service Date Range

Service Completed date range separated by a comma.

Clear Parameters

Export to a file? File Format: File Name:

Preview/Test Run Print/Update Schedule Task Close

The Service Totals, Payment Totals and ACH Weekly Fiscal Rpt under CORRACCT will be used by the Counties.

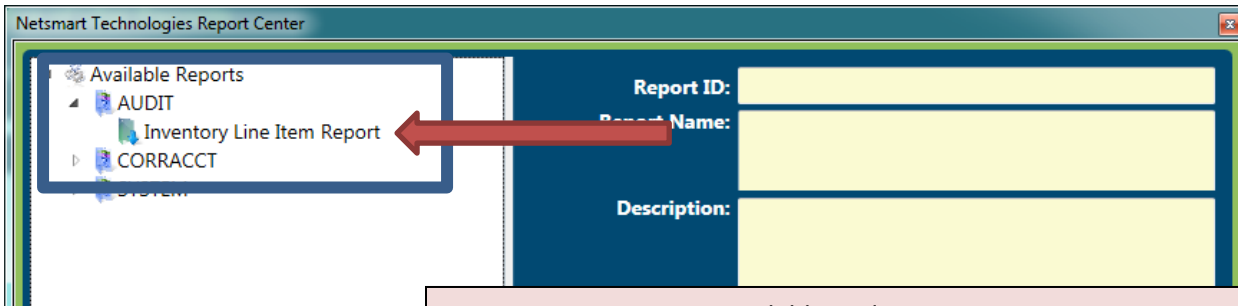
When the report name is highlighted on the left, a Date Range field is available.

For the Service Totals and Payment Totals, the dates are entered in the form of mm/dd/yyyy,mm/dd/yyyy (notice comma separation)

The ACH Weekly Fiscal Rpt you will need to enter the dates in separate fields.

Click Preview/Test Run to view report.

Inventory Report



An Inventory Report is available under AUDIT>Inventory Line Item Report.

Enter the date in the ID_Trans_Date field in the same format as other reports.

Example: 08/01/2014,08/02/2014 mm/dd/yyyy,mm/dd/yyyy

Report will lump control numbers separately **by transaction type**.

Example: USE transaction types will show all numbers in order.

VOID will show all voided certified numbers in order.

View

ID_TRANS_DATE between 07/01/2014,08/25/2014
ID_TRANSACTION equal
USER_LOCATION_CODE equal CNTY-054

Transaction	Trans Date	Item	Quantity	Start No.	End No.	Assigned To	User Loc Code
USE							
	07/22/2014	County Certified Paper	1	4154086	4154086	STORE	CNTY-054
	07/22/2014	County Certified Paper	1	4154087	4154087	STORE	CNTY-054
	07/03/2014	County Certified Paper	1	4154088	4154088	STORE	CNTY-054
	07/25/2014	County Certified Paper	1	4154089	4154089	STORE	CNTY-054
	07/25/2014	County Certified Paper	1	4154090	4154090	STORE	CNTY-054
	07/15/2014	County Certified Paper	1	4154091	4154091	STORE	CNTY-054
	07/16/2014	County Certified Paper	1	4154092	4154092	STORE	CNTY-054
	07/16/2014	County Certified Paper	1	4154093	4154093	STORE	CNTY-054
	07/16/2014	County Certified Paper	1	4154094	4154094	STORE	CNTY-054
	07/17/2014	County Certified Paper	1	4154095	4154095	STORE	CNTY-054
	07/21/2014	County Certified Paper	1	4154096	4154096	STORE	CNTY-054
	07/21/2014	County Certified Paper	1	4154097	4154097	STORE	CNTY-054
	07/22/2014	County Certified Paper	1	4154098	4154098	STORE	CNTY-054
	07/23/2014	County Certified Paper	1	4154099	4154099	STORE	CNTY-054
	07/25/2014	County Certified Paper	1	4154101	4154101	STORE	CNTY-054
	07/28/2014	County Certified Paper	1	4154102	4154102	STORE	CNTY-054
	07/29/2014	County Certified Paper	1	4154103	4154103	STORE	CNTY-054
	07/30/2014	County Certified Paper	1	4154104	4154104	STORE	CNTY-054
	08/01/2014	County Certified Paper	1	4154105	4154105	STORE	CNTY-054
	08/04/2014	County Certified Paper	1	4154106	4154106	STORE	CNTY-054
	08/04/2014	County Certified Paper	1	4154107	4154107	STORE	CNTY-054
	08/04/2014	County Certified Paper	1	4154108	4154108	STORE	CNTY-054
	08/11/2014	County Certified Paper	1	4154109	4154109	STORE	CNTY-054

Page 2 of 5

2/5 140 Page: 279.40 x 215.90

Close

Note: Under Transaction column, the transaction type will separate the numbers in numerical order.

ACH

COMPLETING SERVICES IN IVES

Definition of each status type:

- **PENDING** – service is waiting to be processed
- **COMPLETED** – service has been processed
- **CANCELLED** – service has not been processed and never will be
- **RECORD NOT FOUND** – the record cannot be found by the user attempting the search
- **FORWARD TO STATE** – service is being forwarded to the state to process because the record is not found or not available to the user
- **VOID** – service was completed but should now be void because of an error or an issue with the printer, etc. If money was received for the service that was voided, then generally another service will be added to replace it.

Below are the rules that apply for completing a service:

1. When the service status is changed to **COMPLETED** or **RECORD NOT FOUND**, the transaction is applied to the ACH detail table (which means it will be included in the ACH pull).
2. Once a service status is **COMPLETED** or **RECORD NOT FOUND**, the only way to reverse the transaction is to change the status to **VOID**. Once the status is **VOID**, the service cannot be edited.

Example: If anything happens during the print process (like the paper rips or you put the wrong type of paper in) you would VOID the service and create a new one. You no longer need to zero out the number of copies when voiding.

3. Before a service is completed, the status can be changed to **CANCELLED**. **CANCELLED** services do not appear in the ACH detail table and are not a part of the ACH pull. Once the status is **CANCELLED**, the service cannot be edited.

SCHEDULE

The weekly schedule is displayed in a section later in this document titled 'ACH SCHEDULE', but as an overview:

- Services completed (with a status of **COMPLETED** or **RECORD NOT FOUND**) from Tuesday through Monday are included in the following Tuesday ACH file.
- County Recorders have all day Tuesday and Wednesday until 3:00pm to **VOID** a service from the ACH week.
 - Note – A void is really the only type of adjustment that can be done on the prior week's services. If the status of a service is changed to anything other than **VOID**, it will be reflected on the new ACH week that you are currently in, not the previous ACH week.
- On Wednesday at 3:00pm the ACH header report is run again to remove any recently voided services.
- The State Vital Records staff has from 3:30 to 5:00pm to enter manual adjustments to the ACH file for any previous ACH pull that have been verified to be incorrect.
- At 5:00pm the ACH file is staged for transfer to the bank

- Overnight Wednesday the file is transmitted to the bank and the pull should reflect Thursday's date (when the withdrawal actually takes place).
- If at a later date the County Recorder believes they were charged too much for a previous ACH week, they should send an email to the "special" email account for ACH Adjustments. Please send all feedback and inquiries regarding ACH to: ACH@idph.iowa.gov

DAILY REPORTS

It is recommended to run the following reports on a daily basis in order to detect issues in a timely manner.

- **Payments Totals** – is simply a report of the payments entered into the system between the dates provided
- **Service Totals** – is a report of the services that were completed (status changed to COMPLETED or RECORD NOT FOUND) between the dates provided.

WEEKLY REVIEW

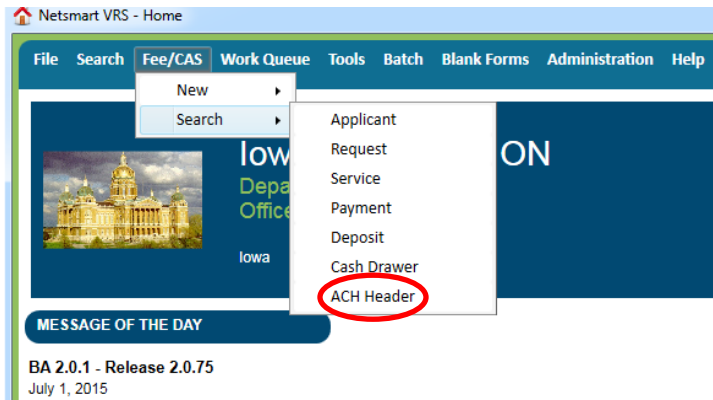
Once the state has run the weekly process to create the ACH detail file, the ACH transactions are available for the county to view and print. *This will help verify that everything is accurate.* The county has all day Tuesday and all day Wednesday (until 3:00pm) to void any transaction that is incorrect simply by changing the service status to VOID.

- **ACH Weekly Fiscal Report** – is a printable report of the services that were processed between the dates provided. The parameter dates should be Tuesday through the following Monday. The ACH Date field will be blank until the file is 'finalized' and sent to the bank. This report can also be printed at a later time (at which time the ACH Date field will appear with the date the transaction took place).

<div> <div> CORRACT </div> <div> ACH Weekly Fiscal Rpt </div> <div> Payment Totals </div> <div> Service Totals </div> </div>	Report Name:	Ach Weekly Fiscal Report
	Description:	
	Report Type:	Report Builder
	Parameter Set:	
	Enter Begin Date of Service 02/24/2015 Enter ending date of service 03/02/2015 User Location @USER_LOCATION_DESC	

Company Description: County VR		Enter Begin Date of Service equal 02/24/2015			ACH Date: 03/05/2015	
		Enter ending date of service equal 03/02/2015				
		User Location equal Warren				
Warren		Copies	VR	GF	ME	County Retains
BIRTH	Certified Copy	3	\$39.00	\$9.00	\$0.00	\$12.00
BIRTH	Plain Paper Copy	2	\$0.00	\$0.00	\$0.00	\$5.00
DEATH	Certified Copy	2	\$22.00	\$4.00	\$6.00	\$8.00
DEATH	Fact of Death	1	\$13.00	\$3.00	\$0.00	\$4.00
MARRIAGE	Application	4	\$52.00	\$72.00	\$0.00	\$16.00
MARRIAGE	Certified Copy	2	\$32.00	\$0.00	\$0.00	\$8.00
MARRIAGE	Plain Paper Copy	1	\$0.00	\$0.00	\$0.00	\$5.00
County Total		15	\$158.00	\$88.00	\$6.00	\$58.00

- The details of each week's ACH file are also available under the menu **Fee/CAS – Search – ACH Header**



Example #1: One ACH Period

Enter in criteria for the week desired (**Example #1**) and select **Search** or you can do a search to populate a listing for **ALL**) ACH periods (**Example #2**) by entering your county name only without a date.

Example #1

RequestID	First	Last	Completed	Event	Service	FeeType	Copies	Kept by County	ToState	Total	Adj
10948	Testing	Disposition	2/3/2015	DEATH	Certified Copy	No Fee	1	0.00	0.00	0.00	N
10955	Ellen	Warner	2/5/2015	BIRTH	Certified Copy	Standard	1	4.00	16.00	20.00	N
10924	Dean	Warner	2/9/2015	MARRIAGE	Certified Copy	No Fee	1	0.00	0.00	0.00	N
10924	Dean	Warner	2/9/2015	MARRIAGE	Certified Copy	Standard	1	4.00	16.00	20.00	N
11051	Hannah	Warner	3/4/2015	MARRIAGE	Certified Copy	No Fee	1	0.00	0.00	0.00	N

Example # 2: Pull a listing of All ACH Periods

Search - ACH Header

File Search **Feg/CAS** Requests/Documents Tools Batch Administration Help

Search Criteria Results

Begin Date of Service End Date of Service OWED_TO STATE

Deposit Date

Stripoff Date User Location

User Location Code

Reset/Clear Search

Search Event

Example # 2

Search - ACH Header

File Search **Feg/CAS** Requests/Documents Tools Batch Administration Help

Search Criteria Results

Begin Date of Service	End Date of Service	OWED_TO STATE	Deposit Date	Stripoff Date	User Location	User Location Code	ACH#
10/1/2014	11/22/2014	\$283.00			Warren	CNTY-091	1091
11/18/2014	11/24/2014				Warren	CNTY-091	1192
1/13/2015	1/19/2015	\$280.00			Warren	CNTY-091	1495
2/17/2015	2/23/2015	\$111.00			Warren	CNTY-091	2606
2/23/2015	2/23/2015	\$16.00			Warren	CNTY-091	2707
2/24/2015	3/2/2015	\$252.00	3/5/2015	3/5/2015	Warren	CNTY-091	3107
5/7/2015	5/7/2015	\$31.00			Warren	CNTY-091	3206
5/1/2015	5/25/2015				Warren	CNTY-091	3305
5/1/2015	5/26/2015				Warren	CNTY-091	3602
5/20/2015	5/28/2015	\$47.00			Warren	CNTY-091	3701
6/1/2015	6/15/2015				Warren	CNTY-091	3998
1/1/2015	6/15/2015	\$221.00			Warren	CNTY-091	4196
1/1/2015	6/20/2015				Warren	CNTY-091	4592

Reset/Clear Display Records Found: 13

Search Event

Each service can be viewed in detail by double-clicking on it.

ACH Details

User Location: User Location Code:

Services

First name: Last Name: RequestID: ServiceID:

Service Completed Date: Owed to State: Kept by County:

Record is Adjustment?: Adjustment Notes:

Event Type: Service Type: Fee Type: Copies: Service Total:

Funds

Fund 1: State or Local: Amount:

Fund 2: State or Local: Amount:

Fund 3: State or Local: Amount:

ACH Header

File Search Fee/CAS Requests/Documents Actions Linking Tools Administration Help

ACH County Flags

County Information

User Location Description: User Location Code:

Begin Date of Service: End Date of Service: Deposit Date: Stripoff Date:

Owed To State: Adjustments are Included:

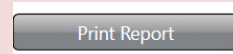
Detail Information (services)

Detail Grid

RequestID	First	Last	Completed	Event	Service	FeeType	Copies	Kept by County	ToState	Total	Adjustment?
11052	Dean	Warner	2/24/2015	MARRIAGE	Application	Standard	1	4.00	31.00	35.00	N
11045	Ellen-One	Warner	2/25/2015	BIRTH	Certified Copy	Standard	1	4.00	16.00	20.00	N
11045	Ellen-One	Warner	2/25/2015	BIRTH	Certified Copy	Standard	1	4.00	16.00	20.00	N
11046	Dale	Warner	2/25/2015	DEATH	Certified Copy	Standard	2	8.00	32.00	40.00	N
11046	Dale	Warner	2/25/2015	DEATH	Fact of Death	Standard	1	4.00	16.00	20.00	N
11047	Dean	Warner	2/25/2015	MARRIAGE	Application	Standard	1	4.00	31.00	35.00	N
11048	Deidra	Warner	2/25/2015	MARRIAGE	Application	Standard	1	4.00	31.00	35.00	N
11049	Loretta	Warner	2/25/2015	MARRIAGE	Application	Standard	1	4.00	31.00	35.00	N
11050	Gloria	Warner	2/25/2015	BIRTH	Plain Paper Copy	No Fee	1	0.00	0.00	0.00	N
11051	Hannah	Warner	2/25/2015	MARRIAGE	Certified Copy	Standard	1	4.00	16.00	20.00	N
11082	Jeanetta	Warner	2/27/2015	BIRTH	Certified Copy	Standard	1	4.00	16.00	20.00	N
11082	Jeanetta	Warner	2/27/2015	BIRTH	Plain Paper Copy	Standard	1	5.00	0.00	5.00	N
11084	Leroy	Warner	2/27/2015	MARRIAGE	Certified Copy	Standard	1	4.00	16.00	20.00	N
11084	Leroy	Warner	2/27/2015	MARRIAGE	Plain Paper Copy	Standard	1	5.00	0.00	5.00	N

Printing the Report

Open the ACH Header Report, Click on the Print Report Button.



When the report opens, click the print icon in the upper left hand corner.



Warren

Begin Date of Service: End Date of Service: Deposit Date: Stripoff Date:

OWED_TO_STATE: Adjustments Included:

RequestID	First	Last	Completed	Event	Service	Fee Type	Copies	Kept by County	To State	Total	Adj
11052	Dean	Warner	02/24/2015	MARRIAGE	Application	Standard	1	4.00	31.00	35.00	N
11045	Ellen-One	Warner	02/25/2015	BIRTH	Certified Copy	Standard	1	4.00	16.00	20.00	N
11045	Ellen-One	Warner	02/25/2015	BIRTH	Certified Copy	Standard	1	4.00	16.00	20.00	N
11046	Dale	Warner	02/25/2015	DEATH	Certified Copy	Standard	2	8.00	32.00	40.00	N
11046	Dale	Warner	02/25/2015	DEATH	Fact of Death	Standard	1	4.00	16.00	20.00	N
11047	Dean	Warner	02/25/2015	MARRIAGE	Application	Standard	1	4.00	31.00	35.00	N
11048	Deidra	Warner	02/25/2015	MARRIAGE	Application	Standard	1	4.00	31.00	35.00	N
11049	Loretta	Warner	02/25/2015	MARRIAGE	Application	Standard	1	4.00	31.00	35.00	N
11050	Gloria	Warner	02/25/2015	BIRTH	Plain Paper Copy	No Fee	1	0.00	0.00	0.00	N
11051	Hannah	Warner	02/25/2015	MARRIAGE	Certified Copy	Standard	1	4.00	16.00	20.00	N
11082	Jeanetta	Warner	02/27/2015	BIRTH	Certified Copy	Standard	1	4.00	16.00	20.00	N
11082	Jeanetta	Warner	02/27/2015	BIRTH	Plain Paper Copy	Standard	1	5.00	0.00	5.00	N

Page: 279.40 x 215.90

Forward a Request to the State

There will be situations where a record cannot be found at the county level. There are many reasons that could happen (it's not always the case that the record is sealed). In addition, it may only be one request within an application that contains multiple requests.

Netsmart VRS - Home

File Search Fee/CAS Work Queue Tools Batch Blank Forms Administration Help

New Search Applicant Deposit Cash Drawer

Iowa Department of Health Office of Vital Records

MESSAGE OF THE DAY

BA 2.0.1 - Release 2.0.75
July 1, 2015

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Start a New Application

Click Fee/CAS > New > Applicant

Applicant

File Search Fee/CAS Requests Actions Work Queue Linking Tools Help

Application Mailing Billing Flags Reassign Request Refund/Return/Info

Application Status

Applicant Number Date of Application (mm/dd/yyyy) Application Type Assigned to (Queue) Priority

03/26/2014 PENDING NORMAL

Identification PENDING Completed (mm/dd/yyyy) Completed By

First Name Last Name Company/Agency Name

United States Iowa City

Address 1 Address 2 (optional) Zipcode

Phone (Primary) Fax (if applicable) Email Is Applicant Address same as mailing?

Services

Total Amount Charged - Total Amount Paid = Amount Due State Amount Local Amount

0.00 0.00 0.00

Request and Payment Information

You must save the record before trying to add a new request or payment the first time. (The Applicant Number must be present)

Requests Payments

Enter required fields on this page are:
Application Status, Date of Application,
Application Type, First Name and Last Name.
You can fill in additional information you wish.

You must click **SAVE** before proceeding to
processing a payment.

Applicant

File Search Fee/CAS Requests/Documents Actions Work Queue Linking Tools Help

Application Mailing Billing Flags Reassign Request Refund/Return/Info

Application Status

Applicant Number: 10657 Date of Application (mm/dd/yyyy): 12/04/2015 Application Type: Counter Assigned to (Queue): PENDING Priority: NORMAL

Identification: Drivers License Status: PENDING Date Completed (mm/dd/yyyy): / / Completed By:

Applicant Information

First Name: Purple Last Name: Dot Company/Agency Name:

Country: United States State Name: Iowa City: WAUKEE

Address 1: 321 RAINBOW LANE Address 2 (optional): Zipcode: 50263

Phone (Primary): (***_***_****) Fax (if applicable): (***_***_****) Email: Is Applicant Address same as mailing? ☒


Services

Total Amount Charged: 0.00 - Total Amount Paid: 0.00 = Amount Due: 0.00 State Amount: Local Amount:

Request and Payment Information

You must save the record before trying to add a new request or payment the first time. (The Applicant Number must be present)

Requests: + Payments: +

Next, you will add a payment. Click the  button to access the Payment for Services screen.

Payment

File Search Fee/CAS Requests Actions Linking Tools Help

Payment for Services Flags

Payment

Payment Date: 03/26/2014 Payment Type: CASH Check/MO Number: Payment Amount:

Drawer Name: BIRD, MELISSA R. Internal payment notes:

Create Date/Time: 03/26/2014 14:19:36 Bird, Melissa R.

Choose your payment type, enter check number if applicable, and enter amount paid.

If you are splitting the amount between 2 different money types, each money type must be entered separately.

Applicant

File Search Fee/CAS Requests/Documents Actions Work Queue Linking Tools Help

Application Mailing Billing Flags Reassign Request Refund/Return/Info

Application Status

Applicant Number: 10657 Date of Application (mm/dd/yyyy): 12/04/2015 Application Type: Counter Assigned to (Queue): PENDING Priority: NORMAL

Identification: Drivers License Status: PENDING Date Completed (mm/dd/yyyy): / / Completed By:

Applicant Information

First Name: Purple Last Name: Dot Company/Agency Name:

Country: United States State Name: Iowa City: WAUKEE

Address 1: 321 RAINBOW LANE Address 2 (optional): Zipcode: 50263

Phone (Primary): (***_***_****) Fax (if applicable): (***_***_****) Email: Is Applicant Address same as mailing? ☒

Services


Total Amount Charged: 0.00 - Total Amount Paid: 20.00 = Amount Due: (20.00) State Amount: Local Amount:

Request and Payment Information

You must save the record before trying to add a new request or payment the first time. (The Applicant Number must be present)

Requests: + Payments: +

Payment Date	Payment Type	Check Num	Amount	Receipt No	Returned	Pay
12/4/2015	CASH		20.00	10657		867

Next, choose a Request type. Click the  button to access the Services screen.

Request

File Search Fee/CAS Requests Actions Linking Tools Help

Service Marital Information Flags

Requested Record Information

Type of Event Date of Event or Beginning Date (mm/dd/yyyy) End Date - if exact date is known enter here also (mm/dd/yyyy)

First Name Middle Name Last Name Generational Identifier

Purpose of Request Relationship

Service Totals for this request

Total of Services for this Request State Amount Local Amount

Service Information

To add a service, click the Add New Service button or click the + (Plus) button.
To change service information, select a row and then change the information in the fields at the top of the paragraph.
To view the details of a service, double click an entry or select an entry and press ENTER key.

Add New Service Service Type Fee Type Copies Status Save Service

Enter required fields: Type of Event, First Name of person on record, Last Name, Purpose of Request and Relationship to person of request. *You can fill in additional information you wish*

Save

Request

File Search Fee/CAS Requests/Documents Actions Linking Tools Help

Service Marital Information Flags

Requested Record Information

Type of Event Date of Event or Beginning Date (mm/dd/yyyy) End Date - if exact date is known enter here also (mm/dd/yyyy)

First Name Middle Name Last Name Generational Identifier

Purpose of Request Relationship

Service Totals for this request

Total of Services for this Request State Amount Local Amount

Service Information

To add a service, click the Add New Service button or click the + (Plus) button.
To change service information, select a row and then change the information in the fields at the top of the paragraph.
To view the details of a service, double click an entry or select an entry and press ENTER key.

Add New Service Service Type Fee Type Copies Status Save Service

Services +

Search

Search for Event Record

Click the Add New Service button.

- Choose Service Type
- Choose Fee Type = **Standard**
- Enter # of copies
- Click the Save Service button.

Add New Service

Service Type Fee Type Copies Status Save Service

Event Type	Service Type	Fee Type	Copies	Service Total	Status	Search?	ServiceID
DEATH	Certified Copy	Standard	1	20.00	PENDING	Y	303

Services +

Request

File Search Fee/CAS Requests/Documents Actions Linking Tools Help

Service Marital Information Flags

Requested Record Information

Type of Event: BIRTH Date of Event or Beginning Date (mm/dd/yyyy): 08/09/2000 End Date - if exact date is known enter here also (mm/dd/yyyy): 08/09/2000

First Name: Purple Middle Name: Last Name: Dot: Generational Identifier:

Purpose of Request: Drivers License or Permit Relationship: Self

Service Totals for this request

Total of Services for this Request	State Amount	Local Amount
20.00	16.00	4.00

Service Information

To add a service, click the Add New Service button or click the + (Plus) button.
To change service information, select a row and then change the information in the fields at the top of the paragraph.
To view the details of a service, double click an entry or select an entry and press ENTER key.

Add New Service Service Type: Certified Copy Fee Type: Standard Copies: 1 Status: RECORD NOT FOUND Save Service

Event Type	Service Type	Fee Type	Copies	Service Total	Status	Search?	ServiceID
BIRTH	Certified Copy	Standard	1	20.00	RECORD NOT FOUND	Y	16246

Services +

Search

Search for Event Record

Manually change the "PENDING" status to "RECORD NOT FOUND" (this ensures that the county keeps their split of the service fee).

Click Save Service button

File Search Fee/CAS Requests/Documents Actions Linking Tools Help

Service Marital Information Flags

Requested Record Information

Type of Event: BIRTH Date of Event or Beginning Date (mm/dd/yyyy): 08/09/2000 End Date - if exact date is known enter here also (mm/dd/yyyy): 08/09/2000

First Name: Purple Middle Name: Last Name: Dot: Generational Identifier:

Purpose of Request: Drivers License or Permit Relationship: Self

Service Totals for this request

Total of Services for this Request	State Amount	Local Amount
20.00	16.00	4.00

Service Information

To add a service, click the Add New Service button or click the + (Plus) button.
To change service information, select a row and then change the information in the fields at the top of the paragraph.
To view the details of a service, double click an entry or select an entry and press ENTER key.

Add New Service Service Type: Certified Copy Fee Type: No Fee Copies: 1 Status: PENDING Save Service

Event Type	Service Type	Fee Type	Copies	Service Total	Status	Search?	ServiceID
BIRTH	Certified Copy	Standard	1	20.00	RECORD NOT FOUND	Y	16246
BIRTH	Certified Copy	No Fee	1	0.00	PENDING	Y	16247

Services +

Search

Search for Event Record

Create a Second Service.

- Click Add New Service button
- Choose Service Type
- Choose Fee Type = **NO FEE**
- Enter # of copies
- Click Save Service button

Request

File Search Fee/CAS Requests/Documents Actions Linking Tools Help

Service Marital Information Flags

Requested Record Information

Type of Event Date of Event or Beginning Date (mm/dd/yyyy) End Date - if exact date is known enter here also (mm/dd/yyyy)

First Name Middle Name Last Name Generational Identifier

Purpose of Request Relationship

Service Totals for this request

Total of Services for this Request State Amount Local Amount

Service Information

To add a service, click the Add New Service button or click the + (Plus) button.
To change service information, select a row and then change the information in the fields at the top of the paragraph.
To view the details of a service, double click an entry or select an entry and press ENTER key.

Add New Service Service Type Fee Type Copies Status Save Service

Event Type	Service Type	Fee Type	Copies	Service Total	Status	Search?	ServiceID
BIRTH	Certified Copy	Standard	1	20.00	RECORD NOT FOUND	Y	16246
BIRTH	Certified Copy	No Fee	1	0.00	FORWARD TO STATE	Y	16247

Services +

Search

Search for Event Record

Highlight the "PENDING" service and **Manually** change the "PENDING" status to "Forward to State"

Click Save Service button

Scanning and Attaching Image

On the Service or Application Tab

- Select Actions from the menu
- **Select one of the 3 options:**
 1. Scan Image (if you have a scanner attached to your computer and it allows you to load the image to the application -> use this option)
 2. Load Image from File (if you have a scanner that routes it to a file document requiring you to save it as a file -> use this option)
 3. Load PDF/Word Documentation (if you have a scanner that requires you to save it as a PDF or Word Document -> use this option).

****Below are the instructions for 3 different options to scan and attach document(s).**

Request

File Search Fee/CAS Requests/Documents Actions Linking Tools Help

Service Marital Information Flags

Requested Record Information

Type of Event Date of Event End Date - if exact date is known enter here also (mm/dd/yyyy)

First Name Middle Name Last Name Generational Identifier

Purpose of Request Relationship

Service Totals for this request

Total of Services for this Request State Amount Local Amount

Service Information

To add a service, click the Add New Service button or click the + (Plus) button.
To change service information, select a row and then change the information in the fields at the top of the paragraph.
To view the details of a service, double click an entry or select an entry and press ENTER key.

Add New Service Service Type Fee Type Copies Status

Event Type	Service Type	Fee Type	Copies	Service Total	Status	Search?	ServiceID
BIRTH	Certified Copy	Standard	1	20.00	RECORD NOT FOUND	Y	16246
BIRTH	Certified Copy	No Fee	1	0.00	FORWARD TO STATE	Y	16247

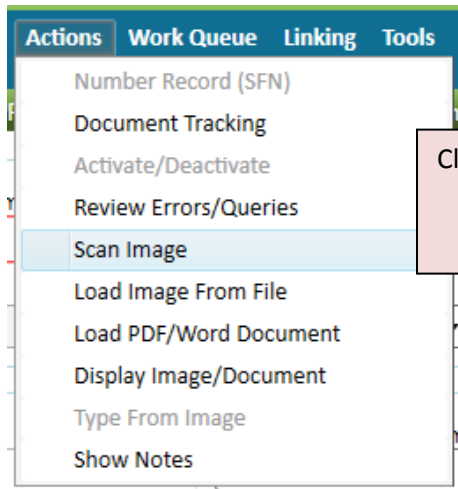
Services +

Actions

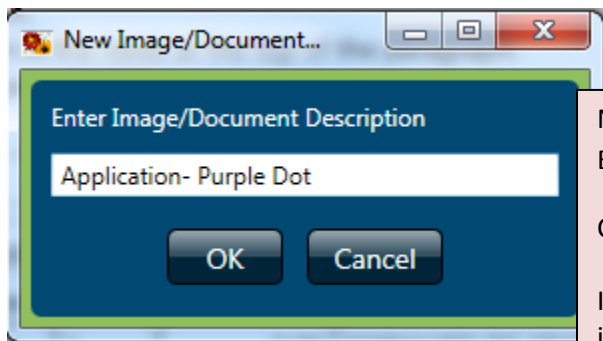
- Number Record (SFN)
- Document Tracking
- Activate/Deactivate
- Review Errors/Queries
- Scan Image
- Load Image From File
- Load PDF/Word Document
- Display Image/Document
- Type From Image
- Show Notes

****Note: everyone has different scanners which works in various ways. So the instructions below gives you 3 different options you have to scan and attach document(s).**

OPTION 1: Scan Image (if you have a scanner attached to your computer and it allows you to load the image to the application)



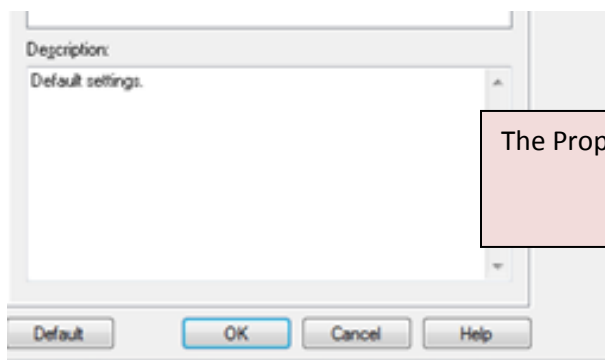
Click Scan Image from the Action Menu



New Image/Document screen will appear – Enter a description for the document.

Click OK

Insert document (application) to be scanned into the Scanner



The Properties Dialog will appear – Select OK

Display Image/Document Selection

Multiple images exist for this event. Please select one record and double-click or press 'Select' or 'Delete' to delete the record.

Delete Set Active/Inactive

Date Created	Event Name	Is Active?	Description	State File #	Document ID
9/14/2015	USERFILE	True	Application		

Select Close

The Display Image/Document Selection will appear with the file you scanned.

Click Close

This will bring you back to your application or service screen.

Request

File Search Fee/CAS Requests/Documents Actions Linking Tools Help

Service Marital Information Flags

Requested Record Information

Type of Event: BIRTH Date of Event or Beginning Date (mm/dd/yyyy): 08/09/2000 End Date - if exact date is known enter here also (mm/dd/yyyy): 08/09/2000

First Name: Purple Middle Name: Last Name: Dot: Relationship: Self

Purpose of Request: Drivers License or Permit

Service Totals for this request

Total of Services for this Request	State Amount	Local Amount
20.00	16.00	4.00

Service Information

To add a service, click the Add New Service button or click the + (Plus) button.
To change service information, select a row and then change the information in the fields at the top of the paragraph.
To view the details of a service, double click an entry or select an entry and press ENTER key.

Add New Service

Event Type	Service Type	Fee Type	Copies	Service Total	Status	Search?	ServiceID
BIRTH	Certified Copy	Standard	1	20.00	RECORD NOT FOUND	Y	16246
BIRTH	Certified Copy	No Fee	1	0.00	FORWARD TO STATE	Y	16247

Search

Search for Event Record

System

Request Status: RECORD NOT FOUND Date Status Changed: 11/24/2015 Changed By: Nichols, Sammui Applicant ID: 10643 Request Queue Assignment: Tracking Number (Ups/Vc/FedEx):

Location Code: CNTY-061 User Location Description: Madison Work Assignment to other location: CENTRAL

Editing an existing event. **IMAGE PRESENT** 0 Alerts:

Close out on your application or service screen.

*Note: The system will then indicate on the bottom of the application or service page that an image is present. **This will require you to refresh the screen to see the message below. Close your service or application Tab and then go back into it and the message will appear on the bottom.**

OPTION 2: Load Image from File (If you have a scanner that requires you to save it as an image -> use this option)

Requested Record Information

Type of Event: BIRTH Date of Event: 08/09/2000

First Name: Purple Middle Name:

Purpose of Request: Drivers License or Permit

Service Totals for this request

Total of Services for this Request	State Amount	Local Amount
20.00	16.00	4.00

Service Information

To add a service, click the Add New Service button or click the + (Plus) button.
 To change service information, select a row and then change the information in the fields at the top of the paragraph.
 To view the details of a service, double click an entry or select an entry and press ENTER key.

Add New Service Service Type: Certified Copy Fee Type: No Fee Copies: 1 Status: PENDING Save Service

Event Type	Service Type	Fee Type	Copies	Service Total	Status	Search?	ServiceID
BIRTH	Certified Copy	Standard	1	20.00	RECORD NOT FOUND	Y	16263
BIRTH	Certified Copy	No Fee	1	0.00	PENDING	Y	16264

Scan the application and supporting documentations (if applicable) through your scanner which will require you to save the Image as a jpeg or tiff on your computer.

On the application, click on the Actions menu>Load Image From File

New Image/Document...

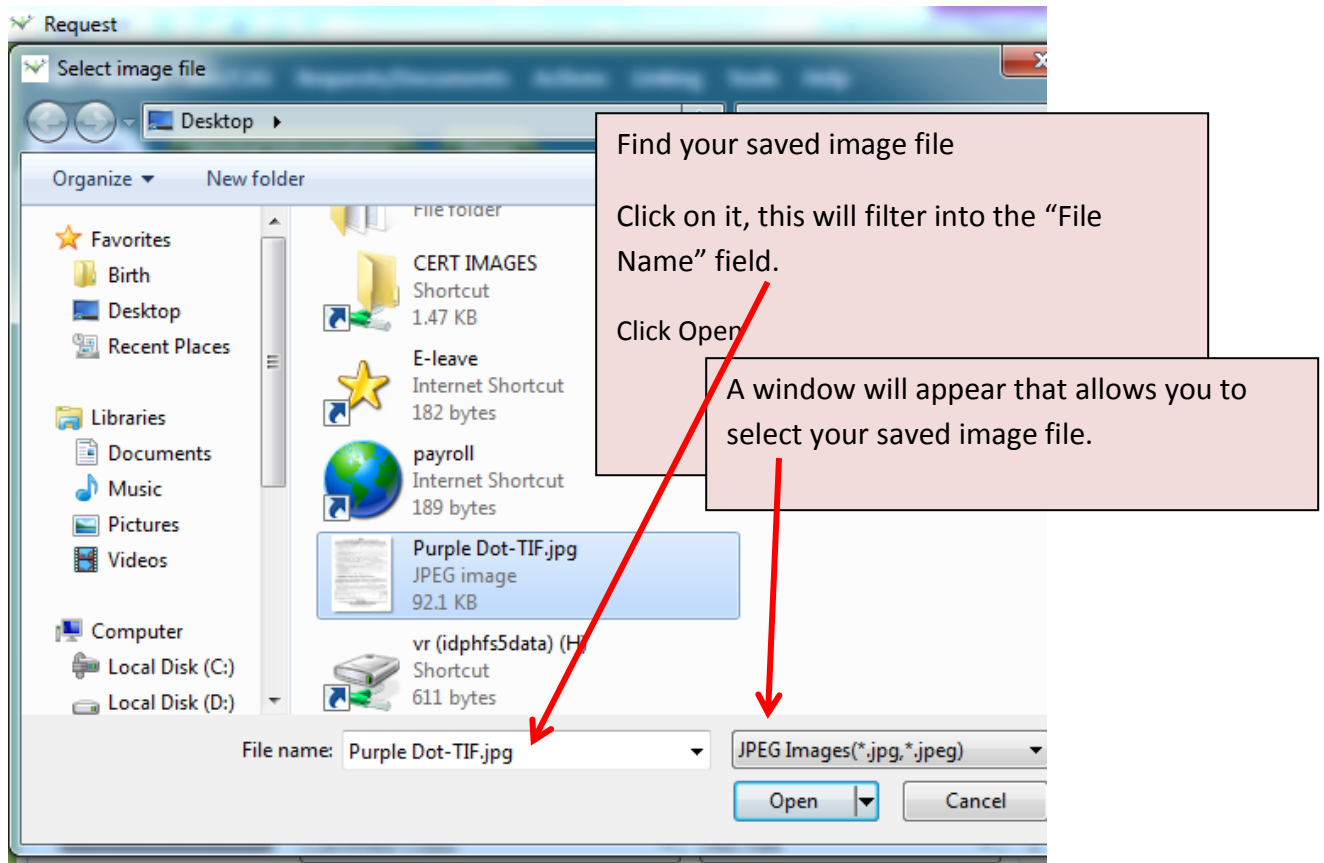
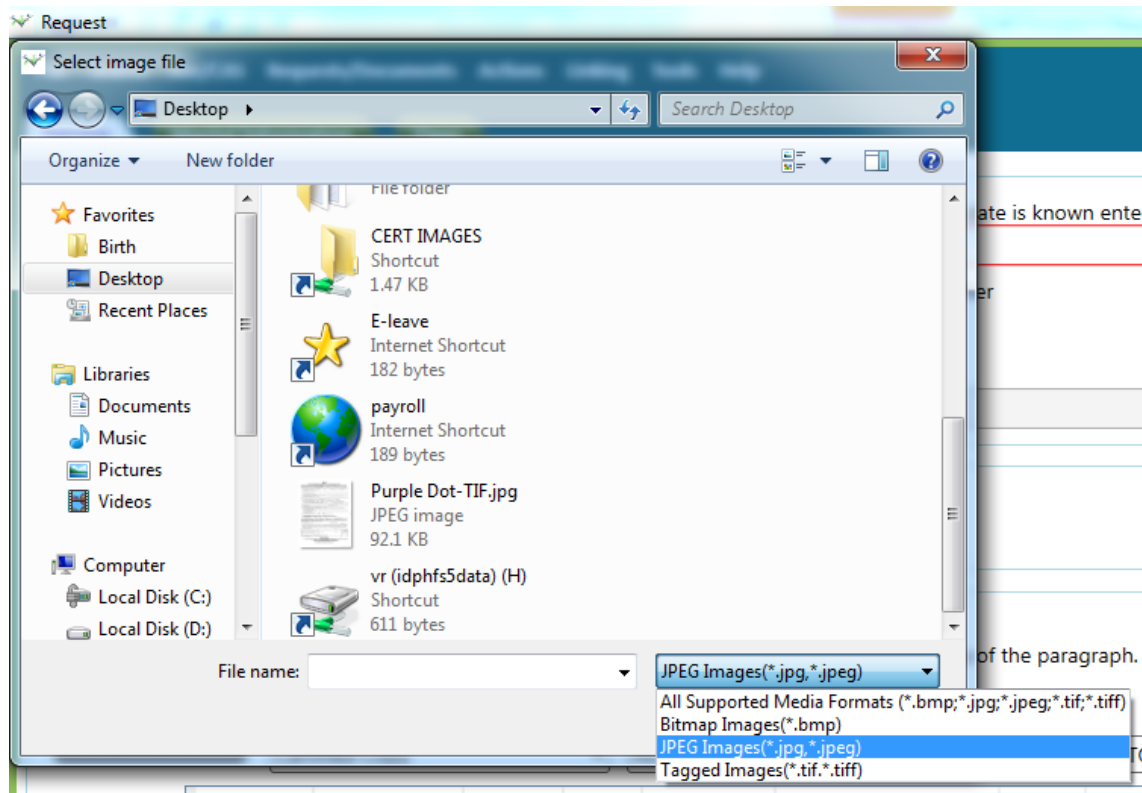
Enter Image/Document Description

Application- Purple Dot

OK Cancel

New Image/Document screen will appear – Enter a description for the document.

Click OK



Picture Tools Draft Forward A Request To The State.docx - Microsoft V

Edit Image/Document

Description Security Function Set Active/Inactive

Is Active?

BIRTH

APPLICATION FOR A SEARCH FOR AN IOWA RECORD

Requests require the applicant's current government-issued photo identification (i.e., driver's license) and signature signed in front of a notary public or in the presence of an Iowa Registrar of Vital Records.

1. PERSON'S NAME AS IT APPEARS ON THE RECORD FIRST MIDDLE, If any LAST (Surname)

2. DATE OF BIRTH - BE SPECIFIC - Month, Day, Year

3. PLACE OF BIRTH (City and/or County)

4. PARENT'S NAME PRIOR TO ANY MARRIAGE - First, Middle, Last (Surname)

5. 2nd PARENT'S FULL NAME - First, Middle, Last (Surname)

6. WAS THE MOTHER MARRIED AT THE TIME OF CONCEPTION OR BIRTH? Yes No Unknown

7. LEGAL ACTIONS TO BIRTH RECORD None Adoption Paternity Establishment Change of Name

7a. IF LEGAL ACTION OCCURRED, LIST PREVIOUS NAME (on both certificates)

8. PURPOSE FOR COPY

9. BIRTHDATE OF APPLICANT

10. HOW ARE YOU RELATED TO THE PERSON NAMED ON THE RECORD?

11. NAME AND ADDRESS OF PERSON TO RECEIVE THIS COPY: (MUST BE ADULT OR OLDER & ENTITLED TO THE RECORD)

12a. Name of Applicant/Recipient

12b. Street address and P.O. Box (if any)

12c. City, State and Zip Code

12. THE SEARCH RESULT IS TO BE (check one) ☐ Picked up ☐ **JPEG** ☐ TIFF ☐ JPEG

Save to DB Save to File Cancel

The image will appear

Click Save to File

**Note: you can choose the type of file you want to save by clicking on the dropdown*

Request

File Search Fee/CAS Requests/Documents Actions Linking Tools Help

Service Marital Information Flags

Requested Record Information

Type of Event BIRTH Date of Event or Beginning Date (mm/dd/yyyy) 08/09/2000 End Date - if exact date is known enter here also (mm/dd/yyyy) 08/09/2000

First Name Purple Middle Name Last Name Dot Generational Identifier

Purpose of Request Drivers License or Permit Relationship Self

Service Totals for this request

Total of Services for this Request	State Amount	Local Amount
20.00	16.00	4.00

Service Information

To add a service, click the Add New Service button or click the + (Plus) button.
To change service information, select a row and then change the information in the fields at the top of the paragraph.
To view the details of a service, double click an entry or select an entry and press ENTER key.

Add New Service Service Type Fee Type Copies Status

Event Type	Service Type	Fee Type	Copies	Service Total	Status	Search	ServiceID
BIRTH	Certified Copy	Standard	1	20.00	RECORD NOT FOUND	Y	16246
BIRTH	Certified Copy	No Fee	1	0.00	FORWARD TO STATE		16247

Search Search for Event Record

System

Request Status RECORD NOT FOUND Date Status Changed 11/24/2015 Changed By Nicholas Sammi Applicant ID 10643 Request Queue Assignment

Location Code CNTY-061 User Location Description Madison Work Assignment to other location CENTRAL

Editing an existing event. **IMAGE PRESENT** 0 Alerts

Close out on your application or service screen.

Note: The system will then indicate on the bottom of the application or service page that an image is present. **This will require you to refresh the screen to see the message below. Close your service or application Tab and then go back into it and the message will appear on the bottom.*

Applicant

File Search Fee/CAS Requests/Documents Actions **Work Queue** Linking Tools Help

Application Mailing Billing Flags **Reassign Request** Refund/Return/Info

Application Status

Applicant Number: 10643 Date of Application (mm/dd/yyyy): 11/19/2015 Application Type: Counter Assigned to (Queue): PENDING Priority: NORMAL

Identification: Drivers License Status: COMPLETED Date Completed (mm/dd/yyyy): 11/24/2015 Completed By: Nichols, Sam

Applicant Information

First Name: Purple Last Name: Dot Company/Agency Name: Country: United States State Name: Iowa City: WAUKEE

Address 1: 321 RAINBOW LANE Address 2 (optional): Zipcode: Phone (Primary): (***_***_****) Fax (if applicable): (***_***_****) Email: Is Applicant Address same as mailing? ☒

Services

Total Amount Charged	- Total Amount Paid	= Amount Due	State Amount	Local Amount
20.00	20.00	0.00	16.00	4.00

Request and Payment Information

You must save the record before trying to add a new request or payment the first time. (The Applicant Number must be present)

Requests + Payments +

Event	First Name	Last Name	Status	Total	Assigned To
BIRTH	Purple	Dot	RECORD NOT FOUND	20.00	

Payment Date	Payment Type	Check Num	Amount	Receipt No	Returned	Pay
11/19/2015	CASH		20.00	10643		866

Go to the application page – Click on Reassign Request Tab

Applicant

File Search Fee/CAS Requests/Documents Actions Work Queue Linking Tools Administration Help

Application Mailing Billing Flags **Reassign Request** Refund/Return/Info

Assignments

Reassign Request to this Location: Central Location Location Code Assigned: CENTRAL

Select "Central Location" from the the dropdown (the forwarded request will appear in the State Office work queue to be completed).

Save and Close

OPTION 3: Load PDF or Word Document (If you have a scanner that requires you to save it as a PDF or Word Document -> use this option)

The screenshot shows the 'Request' application interface. The 'Actions' menu is open, and 'Load PDF/Word Document' is highlighted. The interface includes fields for 'Type of Event' (BIRTH), 'Date of Event' (08/09/2000), 'First Name' (Purple), 'Middle Name', 'Purpose of Request' (Drivers License or Permit), and 'Service Totals for this request'. A table lists services with columns for Event Type, Service Type, Fee Type, Copies, Service Total, Status, and Search?.

Event Type	Service Type	Fee Type	Copies	Service Total	Status	Search?
BIRTH	Certified Copy	Standard	1	20.00	RECORD NOT FOUND	Y
BIRTH	Certified Copy	No Fee	1	0.00	PENDING	Y

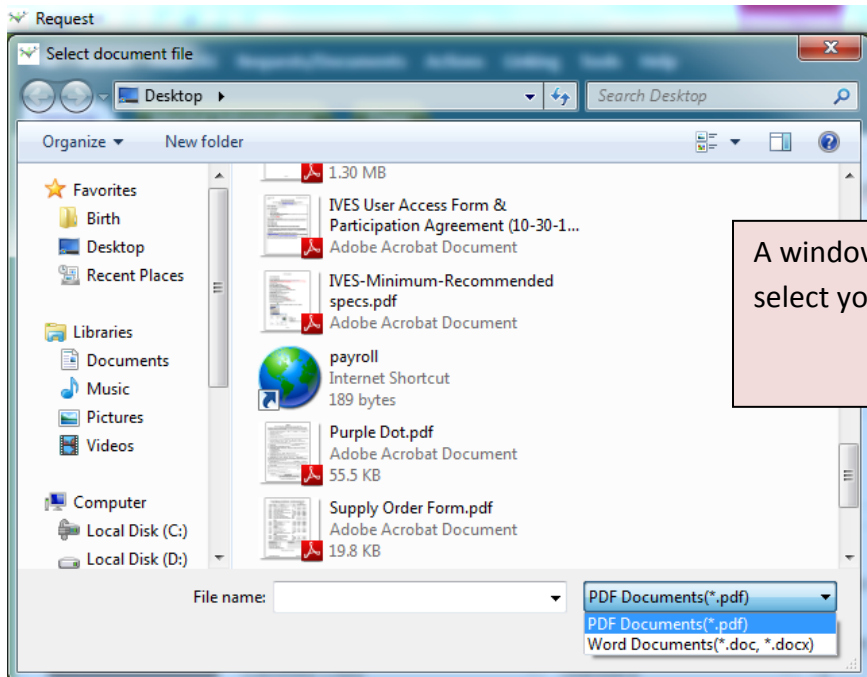
Scan the application and supporting documentations (if applicable) through your scanner which will require you to save it as a PDF or a Word Document on your computer.

On the application, click on the Actions menu>Load PDF/Word Document

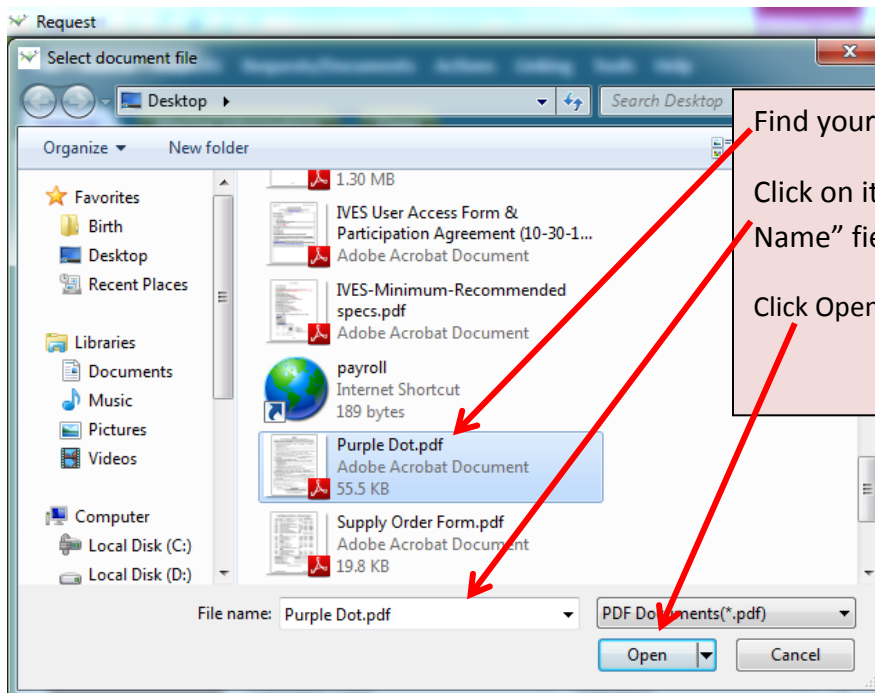
The screenshot shows a 'New Image/Document...' dialog box. The 'Enter Image/Document Description' field contains the text 'purple dot application'. There are 'OK' and 'Cancel' buttons at the bottom.

New Image/Document screen will appear – Enter a description for the document.

Click OK



A window will appear that allows you to select your PDF or Word Document.



Find your saved PDF or Word Document

Click on it, this will filter into the "File Name" field.

Click Open

Edit Image/Document

Description: hgfg

Security Function: [Dropdown]

Set Active/Inactive: ☒ Is Active?

BIRTH

APPLICATION FOR A SEARCH FOR AN IOWA RECORD

Requests require the applicant's current government-issued photo identification and signature signed in front of a notary public or in the presence of an Iowa resident.

- PERSON'S NAME AS IT APPEARS ON THE RECORD: FIRST [Text], MIDDLE, if any [Text]
- DATE OF BIRTH - BE SPECIFIC - Month, Day, Year: [Text]
- PLACE OF BIRTH (City and/or County): [Text]
- PARENT'S NAME PRIOR TO ANY MARRIAGE - First, Middle, Last (Surname): [Text]
- 2ND PARENT'S FULL NAME - First, Middle, Last (Surname): [Text]
- WAS THE MOTHER MARRIED AT THE TIME OF CONCEPTION OR BIRTH? ☐ Yes ☐ No ☐ Unknown
- LEGAL ACTIONS TO BIRTH RECORD ☐ None ☐ Adoption ☐ Paternity Establishment ☐ Legal Change of Name

7a. IF LEGAL ACTION OCCURRED, LIST PREVIOUS NAME (for birth certificate)

1/2 140 Page 108.84 x 273.76

Save to DB Save to File Cancel

The image will appear with the description of the image

Click Save to File

The screen will disappear and bring you back to the application or service screen.

Request

File Search Fee/CAS Requests/Documents Actions Linking Tools Help

Service Marital Information Flags

Requested Record Information

Type of Event: BIRTH Date of Event or Beginning Date (mm/dd/yyyy): 08/09/2000 End Date - if exact date is known enter here also (mm/dd/yyyy): 08/09/2000

First Name: Purple Middle Name: Last Name: Dot: Generational Identifier: [Text]

Purpose of Request: Drivers License or Permit Relationship: Self

Service Totals for this request

Total of Services for this Request	State Amount	Local Amount
20.00	16.00	4.00

Service Information

To add a service, click the Add New Service button or click the + (Plus) button.
To change service information, select a row and then change the information in the fields at the top of the paragraph.
To view the details of a service, double click an entry or select an entry and press ENTER key.

Add New Service

Event Type	Service Type	Fee Type	Copies	Service Total	Status	Search?	ServiceID
BIRTH	Certified Copy	Standard	1	20.00	RECORD NOT FOUND	Y	16246
BIRTH	Certified Copy	No Fee	1	0.00	FORWARD TO STATE	Y	16247

Search

Search for Event Record

System

Request Status: RECORD NOT FOUND Date Status Changed: 11/24/2015 Changed by: Nicklaus, Sammi Applicant ID: 10643 Request Queue Assignment: [Dropdown] Tracking Number (Ups/VC/FedEx): [Text]

Location Code: CNTY-061 User Location Description: Madison Work Assignment to other location: CENTRAL

Editing an existing event. **IMAGE PRESENT** 0 Alerts

Close out on your application or service screen.

*Note: The system will then indicate on the bottom of the application or service page that an image is present. **This will require you to refresh the screen to see the message below. Close your service or application Tab and then go back into it and the message will appear on the bottom.**

Applicant

File Search Fee/CAS Requests/Documents Actions **Reassign Request** Linking Tools Help

Application Mailing Billing Flags **Reassign Request** Refund/Return/Info

Application Status

Applicant Number: 10643 Date of Application (mm/dd/yyyy): 11/19/2015 Application Type: Counter Assigned to (Queue): PENDING Priority: NORMAL

Identification: Drivers License Status: COMPLETED Date Completed (mm/dd/yyyy): 11/24/2015 Completed By: Nichols, Sam

Applicant Information

First Name: Purple Last Name: Dot Company/Agency Name: Country: United States State Name: Iowa City: WAUKEE

Address 1: 321 RAINBOW LANE Address 2 (optional): Zipcode: Phone (Primary): (***_****) Fax (if applicable): (***_****) Email: Is Applicant Address same as mailing? ☒

Services

Total Amount Charged: 20.00 - Total Amount Paid: 20.00 = Amount Due: 0.00 State Amount: 16.00 Local Amount: 4.00

Request and Payment Information

You must save the record before trying to add a new request or payment the first time. (The Applicant Number must be present)

Requests + Payments +

Event	First Name	Last Name	Status	Total	Assigned To
BIRTH	Purple	Dot	RECORD NOT FOUND	20.00	

Payment Date	Payment Type	Check Num	Amount	Receipt No	Returned	Pay
11/19/2015	CASH		20.00	10643		866

Go to the application page – Click on Reassign Request Tab

Applicant

File Search Fee/CAS Requests/Documents Actions WorkQueue Linking Tools Administration Help

Application Mailing Billing Flags **Reassign Request** Refund/Return/Info

Assignments

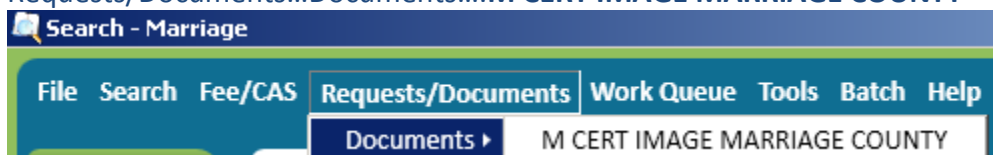
Reassign Request to this Location: Central Location Location Code Assigned: CENTRAL

Select "Central Location" from the the dropdown (the forwarded request will appear in the State Office work queue to be completed).

Save and Close

Print Process with the Ability to Redact Fields on a Marriage Certificates

1. Through the CAS service, search for the desired record and select Requests/Documents...Documents....**M CERT IMAGE MARRIAGE COUNTY**



2. Enter safety paper number > Click OK

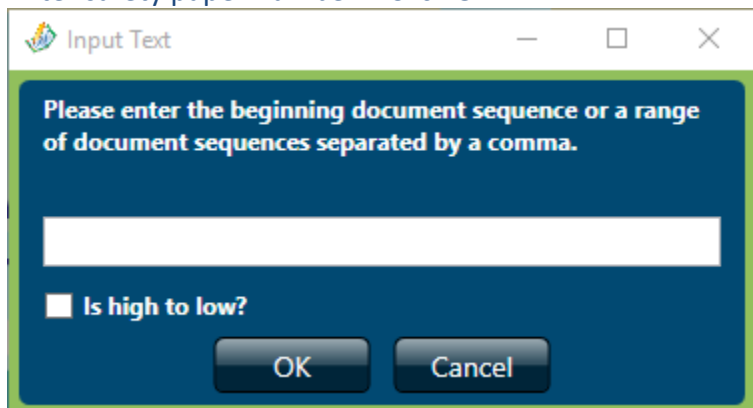


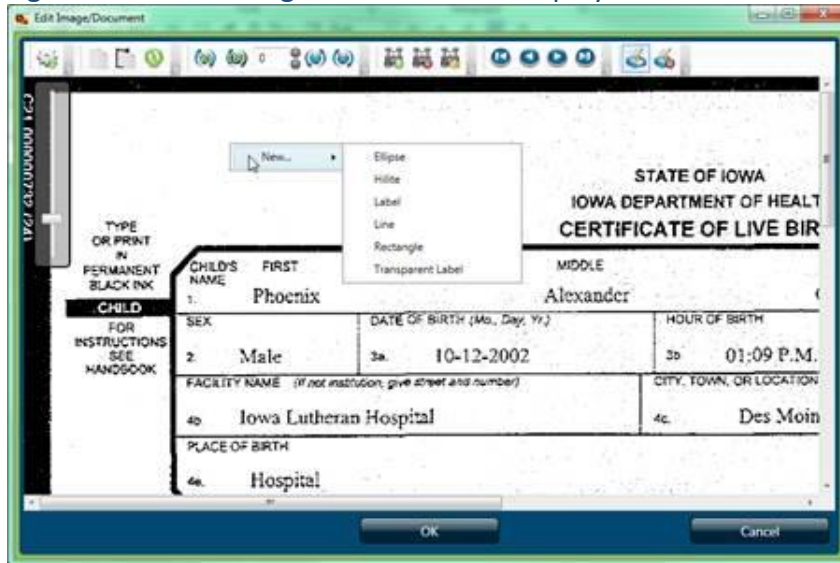
Image will appear with the option to redact.

If you do not need to redact, go to step 7.



Process to Redact marriage image

3. Right click on the image and select the shape you want to use.



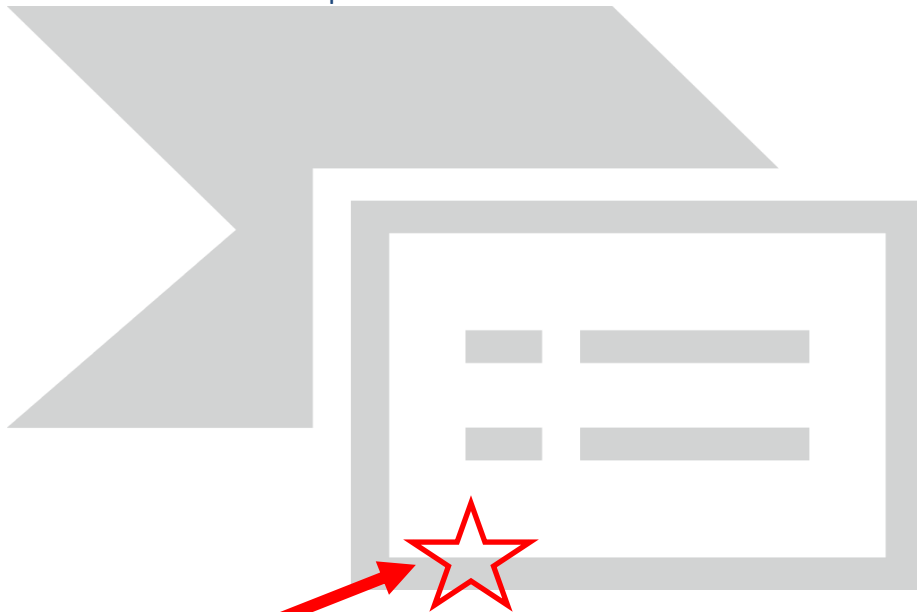
4. Right click on the shape to alter the color as needed.



5. Select Modify.... Properties. This will launch a dialog box for altering the color, size of lines and fill. Choose color as needed (generally black). Click **OK** to accept changes.



6. Move and re-size the shape to redact a field on the document.



7. Click OK on the image

8. The next screen to appear is the Print Preview screen where you can print the document. Click on the print icon

Iowa State Department of Health
DIVISION OF VITAL STATISTICS
67-17207
State File No.

Cherokee County: License No. 6332
GROOM

FULL NAME: (Print) Douglas Stephen Ohlendorf
USUAL RESIDENCE: Marcus, Iowa
City, State
R R 1
Street Address, or Rural Route Number
PLACE OF BIRTH: R R 1, Marcus, Iowa
DATE OF BIRTH: May Mo. 5 Day 17 Yr. Age Last 20 Yrs.
COLOR - RACE: White ☒ Negro ☐ Other ☐ (specify)

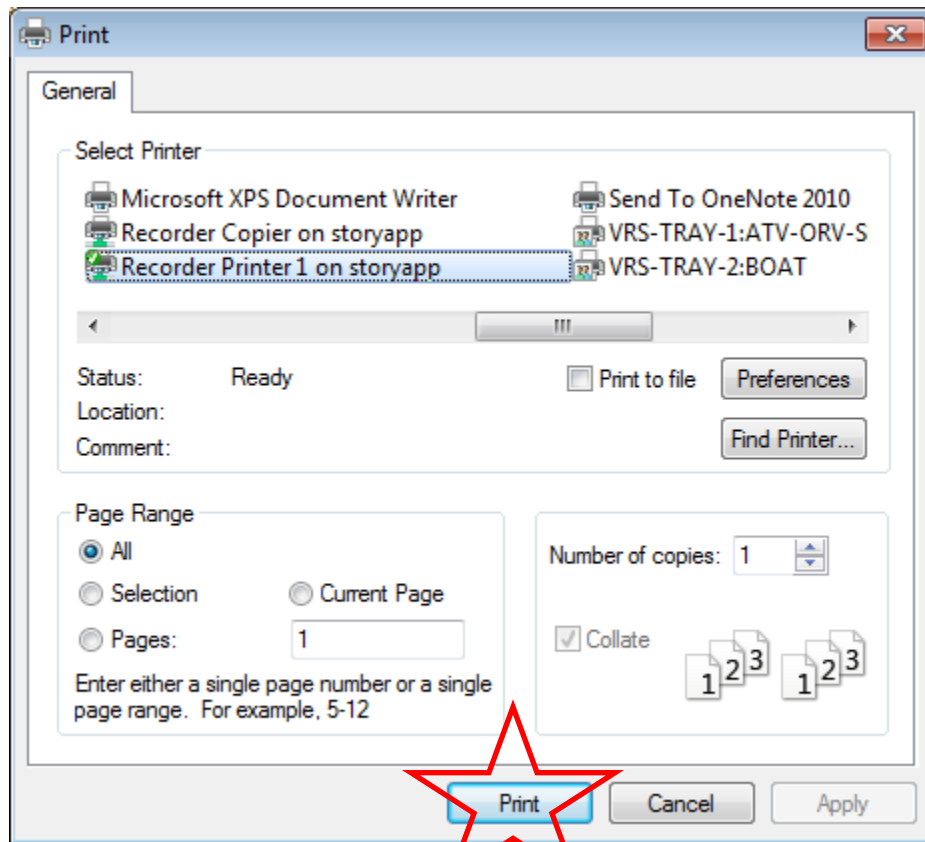
BRIDE

FULL NAME: (Print) Susan Jane Tagstrom
USUAL RESIDENCE: Sioux City, Iowa
City, State
2222 West 2nd St.
Street Address, or Rural Route Number
PLACE OF BIRTH: Lutheran Hospital, Sioux City, Iowa
DATE OF BIRTH: Aug Mo. 19 Day 18 Yr. Age Last 19 Yrs.
COLOR - RACE: White ☒ Negro ☐ Other ☐ (specify)


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Close

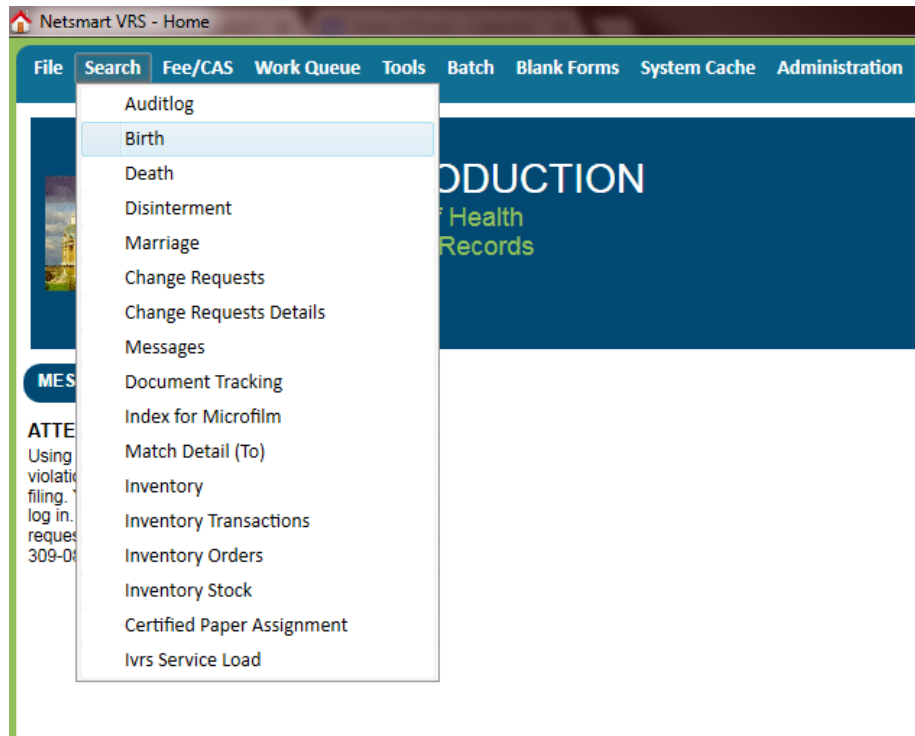
9. The Printer option will appear; your default printer will be highlighted.
Click the Print button



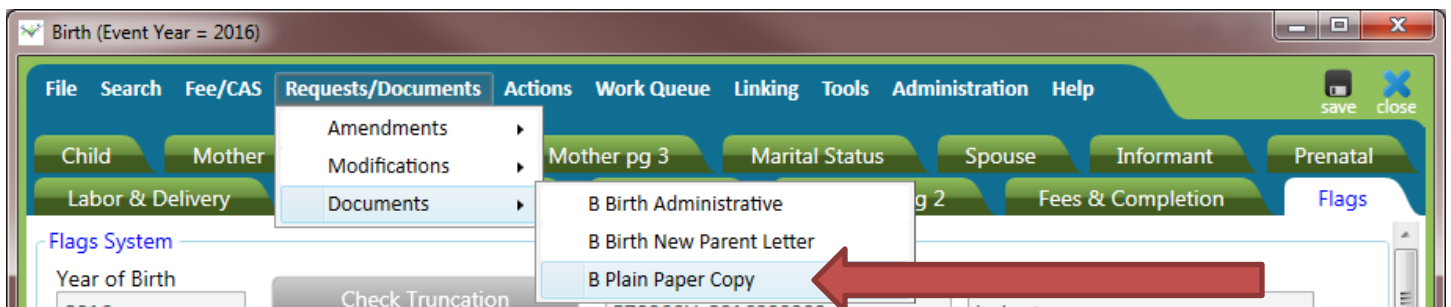
Keyboard Shortcuts for Vital Records System

Move to next field	Tab key
Move to next Tab	Ctrl - Tab Key
Move to previous field	Shift - Tab Key
Move to previous Tab	Shift - Ctrl - Tab Key
Move to first field of next section	Ctrl - P
Clear a field – clears field where cursor is	Ctrl - Z
Enter today's date in a date field	T
Select a checkbox 	Hit spacebar or click – this places a checkmark OR clears a checkmark
Close Window	Alt - F4
Save	Ctrl – S
Wild Cards	Use % for wild cards (for example) Anderson could be end as (son or sen). Use wild card as “Ander%” and both results will appear.
Date Range Search	(MM/DD/YYYY+ MM/DD/YYYY)

Print a Plain Paper Copy of a vital record



1. Search for the event that is being requested – from the Home Screen, SEARCH> [PICK EVENT TYPE]
 - a. Event Types: Birth, Death, Marriage



2. From the event, click REQUEST/DOCUMENTS>DOCUMENTS> PLAIN PAPER COPY
 - a. If the image is available, the image will print.
 - b. If only data is available, the data record will print.
 - c. This is for Births 2005 forward; Deaths 1954 forward; Marriages 1954 forward.
3. No longer use CAS to print plain paper copies; the service has been removed.